gtd®

ONENOTE® FOR WINDOWS®

Setup Guide

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David Allen Company

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FOCUS OF THIS GUIDE

Our focus with this Guide is to show you how to use OneNote® for Windows® for your GTD® workflow. Many people think of OneNote as a tool for storing your non-actionable reference information, but we have found it to also be useful for managing the actionable things as well. This Guide will focus on configuring and populating OneNote for your Project lists and plans, Next Actions lists, and Reference.

The instructions and screenshots show examples for the OneNote 2016 for Windows, but should apply to most recent versions of OneNote. The interface is different enough from the Mac version of OneNote that we chose to do a separate Guide for that platform.

If you are new to OneNote, this Guide should be an excellent starting point for you to build a solid GTD foundation for optimizing your productivity using the built-in features. If you already have an established system in OneNote, use this Guide as an opportunity to fine-tune or simplify, if you have found you've underused or overbuilt your setup.

We are aware that there are many features and ways to configure your GTD system in OneNote. This is not a technical Guide, nor will it cover all the instructions for how to use OneNote. We'll leave that to the folks at Microsoft to share with you through their excellent support material.

This Guide focuses on the methods we have found work well for GTD for a wide range of people. It's also important to note that no one tool will handle all of your needs for GTD, including OneNote. Even with your lists managed in OneNote, you'll still have your Calendar and Email in other programs.

Whatever configuration you choose in tools like OneNote, be careful not to overcomplicate it to the point where you can only maintain it when you are at your peak of mental clarity. It's too easy to be out of that mindset and have the whole system fall apart. Your GTD tools should be complex enough to manage your workflow, but simple enough that if you were sick in bed with the flu, you could still easily maintain them.

Don't worry about using every feature in OneNote. There is likely far more built in than you will ever need. Focus on what makes a difference for you.

OK…let's get started!

Be careful not to overcomplicate your systems to the point where you can only maintain them when you are at your peak of mental clarity.

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UNDERSTANDING THE GTD BEST PRACTICES

To get the most out of OneNote as a tool for your GTD practice, let's review the fundamentals of the Getting Things Done® approach, so you understand how the methodology and tools will intersect.

WHAT IS GTD?

GTD is the shorthand brand for "Getting Things Done", the ground breaking work-life management system and bestselling book[1] by David Allen, which provides concrete solutions for transforming overwhelm and uncertainty into an integrated system of stress-free productivity.

GTD'S FIVE PHASES OF MASTERING WORKFLOW

- **Capture** Collect anything and everything that's grabbing your attention
- **Clarify** Define actionable things into concrete next steps and successful outcomes
- **Organize** Sort information in the most streamlined way, in appropriate categories, based on how and when you need to access it
- **Reflect** Step back to review and update your system regularly
- **Engage** Make trusted choices about what to do in any given moment

THREE STAGES TO INTEGRATING GTD

1. UNDERSTANDING You understand the distinct differences in the five phases of Mastering Workflow. You understand a project versus a next action. You know how to transform what you've collected by asking the key processing questions, clarifying what something is, and what you want to do about it.

2. IMPLEMENTATION You have installed at least the basic gear to support a GTD system, including ubiquitous collection tools, functioning reference systems for your non-actionable information, and seamless buckets with "clean edges" for tracking your projects and next actions.

3. BEHAVIOR CHANGE The five phases of Mastering Workflow are second nature to you. You have changed the way you think and work and are achieving stress-free productivity on a regular basis. When you "fall off" you know what to do to get "back on".

This Guide will leap forward to the Implementation stage, by configuring OneNote as an organizing tool for your projects, actions, and reference. Success at the implementation stage depends on your understanding of GTD. If you are committed to GTD and experiencing stress-free productivity, don't shortchange yourself by skipping the "Understanding" stage.

[1] *Getting Things Done: The Art of Stress-Free Productivity*; Viking, New York; 2001, 2015 hardback or paperback. Available from booksellers or at gettingthingsdone.com

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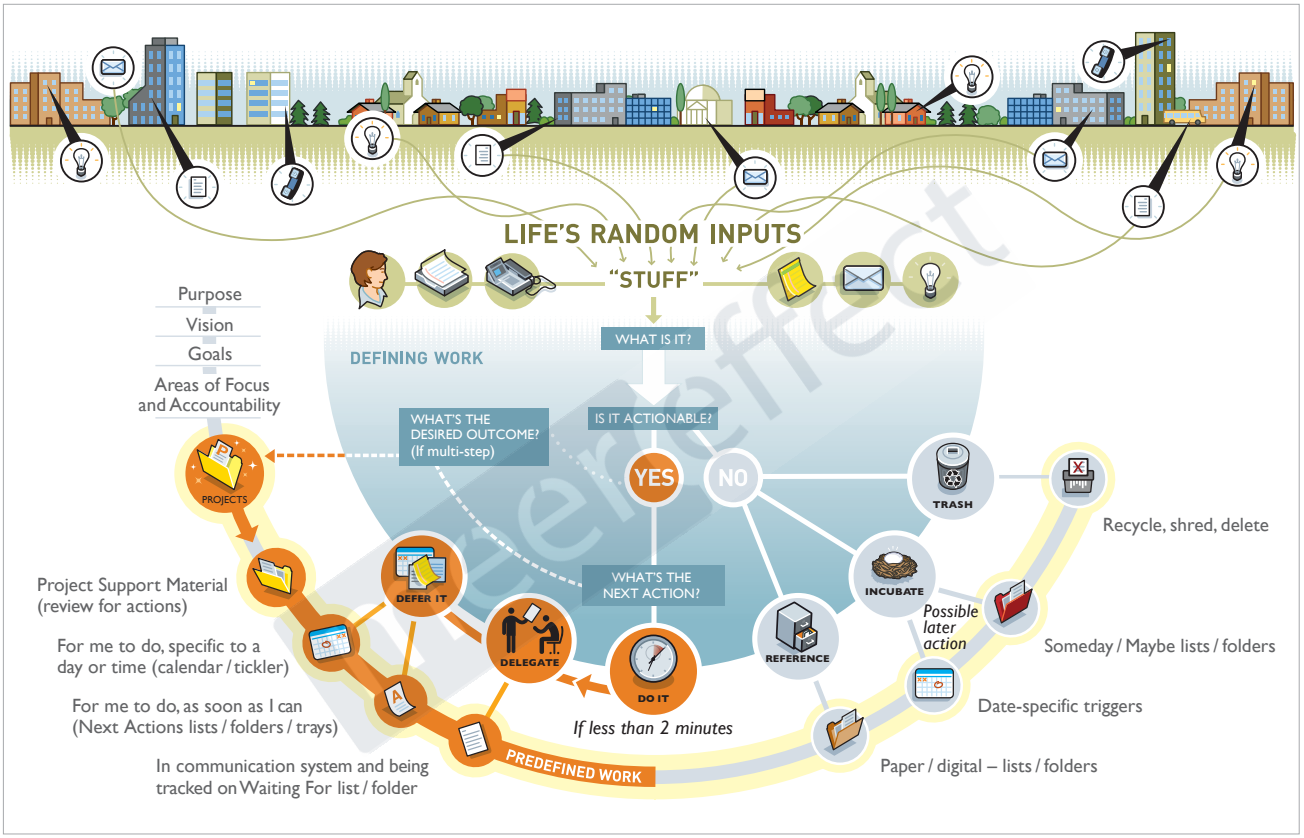
THERE ARE MANY WAYS TO GET A BASIC UNDERSTANDING OF GTD, INCLUDING:

- **Read or listen to the book** *Getting Things Done* is the essential manual for this methodology (part one is an excellent overview of the whole game).
- **Take a course** The courses offered by the David Allen Company and our global partners are excellent primers for understanding the key phases of Mastering Workflow.
- **Practice, practice, practice** The GTD Workflow Map (shown below) is a fantastic coaching tool for walking yourself through the core models for capturing, clarifying, organizing, reflecting, and engaging.

THE GTD WORKFLOW MAP



We recommend getting the full Workflow Map, with all of the GTD models, which comes as a full-color poster or PDF download. Visit our online store at gettingthingsdone.com/store *to learn more.*

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THE GTD WEEKLY REVIEW®

Any tool you use will take effort to keep clean and current so that you can trust your action choices. The OneNote application is no exception. Rest assured, the Weekly Review is what ties this whole thing together, ensuring that you have actions for all the active parts of your projects on a consistent basis, so you can trust that what you are choosing from your next action lists is current. The Weekly Review steps include:

GET CLEAR

Capture Loose Papers and Materials
Gather all accumulated business cards, receipts, and miscellaneous paper-based materials into your in-tray.

Get "IN" to Zero
Clarify completely all outstanding paper materials, journal and meeting notes, voicemails, dictation, and emails.

Empty Your Head
Put in writing and clarify any uncaptured new projects, action items, waiting for's, someday/maybe's, etc.

GET CURRENT

Review Next Actions Lists
Mark off completed actions. Review for reminders of further action steps to record.

Review Previous Calendar Data
Review past calendar in detail for remaining action items, reference data, etc., and transfer into the active system.

Review Upcoming Calendar
Review upcoming calendar events—long and short term. Capture actions triggered.

Review Waiting For List
Record appropriate actions for any needed follow-up. Check off received ones.

Review Project (and Larger Outcome) Lists
Evaluate status of projects, goals, and outcomes, one by one, ensuring at least one current action item on each. Browse through project plans, support material, and any other work-in-progress material to trigger new actions, completions, waiting for's, etc.

Review Any Relevant Checklists
Use as a trigger for any new actions.

GET CREATIVE

Review Someday/Maybe List
Review for any projects which may now have become active, and transfer to "Projects". Delete items no longer of interest.

Be Creative & Courageous
Any new, wonderful, hare-brained, creative, thought-provoking, risk-taking ideas to add into your system???

[2] See the *Getting Things Done* book or our GTD Methodology Guides for a Weekly Review checklist.

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APPLYING GTD TO ONENOTE®

PROJECTS AND NEXT ACTIONS

USING ONENOTE TO MANAGE PROJECTS AND NEXT ACTIONS LISTS

Many people think of OneNote as a reference tool, but with some adaptations, it can be an excellent option for managing the projects and action lists in your GTD system. We recommend you create lists in OneNote Notebooks, Sections, and/or Pages to match the set of lists recommended in the *Getting Things Done* book, which we describe in more detail over the following pages.

THE MOST COMMON GTD LISTS

There are 10 lists recommended in the Getting Things Done book that are a good starter set for most people.

1. Agendas
2. Anywhere
3. Calls
4. Computer
5. Errands
6. Home
7. Office
8. Waiting For
9. Someday/Maybe
10. Projects

Sorting your next actions by context (lists 1–7 above) is recommended, because when you are choosing what to do, context will always be your first limitation. For example, if you are at work, you don't want to be seeing (and having to take the time to skip over) actions that require you to be at home to do. Contexts should map to the people, places, and tools you need to get work done.

SETTING UP LISTS

Let's set up the 10 suggested lists in OneNote now. You can always go back to customize these later, after you've experimented, to discover works best for you. We encourage you to give these lists some time, especially if the concept of sorting by contexts is new to you.

WE WILL BE USING 4 DIFFERENT TYPES OF ENTRIES IN ONENOTE:

- Notebooks
- Sections
- Pages
- Notes

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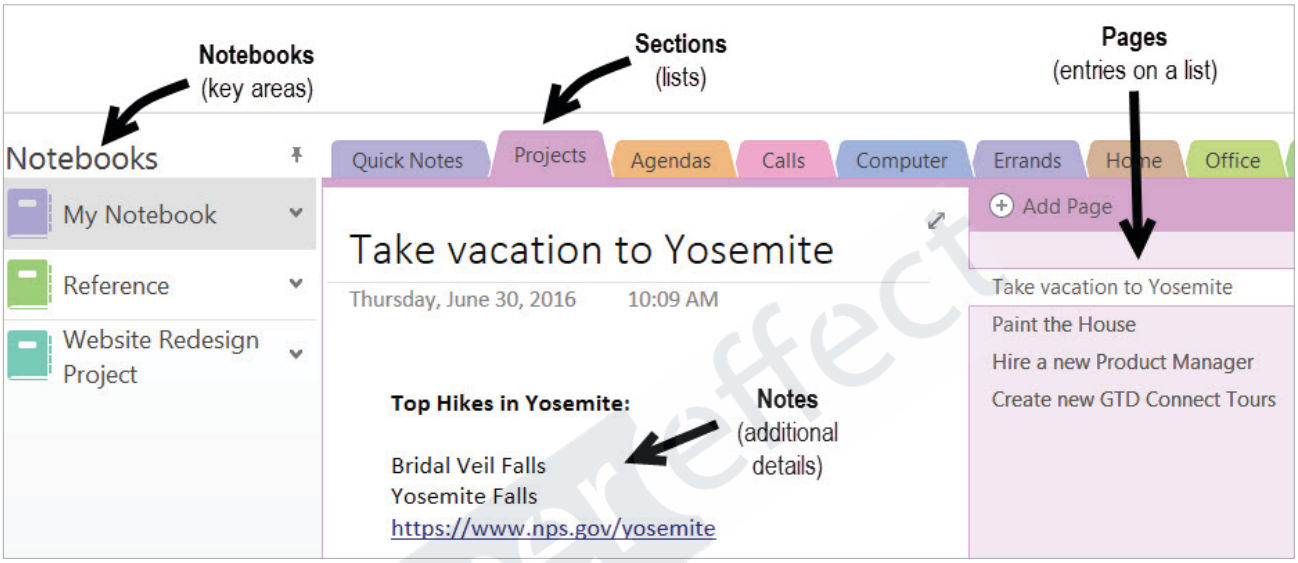
1. Notebooks organize your information by key areas. For example, we will use one Notebook for Projects and Actions and a separate Notebook for Reference. Again, you may choose to customize these later, but creating your system this way now should give you a good foundation to start.

2. Sections will be used for creating lists within your Notebooks. For example, you will be creating lists for Projects, At Computer, Waiting For, Someday/Maybe, etc.

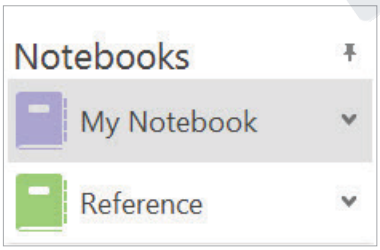
3. Pages will become entries within each list. For example, you would use a Page to create a project on the Projects List, like "Build a new website" or "Call for dentist appointment" on your Calls list.

4. Notes are additional details you may want to add to any item on a list. You could use Notes to capture agenda items for one of your Agenda lists, or project plans for one of the projects on your Projects list.



CREATING NOTEBOOKS

1. First, we recommend pinning your Notebooks drop-down menu, if it's not already set that way, so you can easily access your Notebooks, Sections, and Quick Notes from the side menu, so it looks like this:



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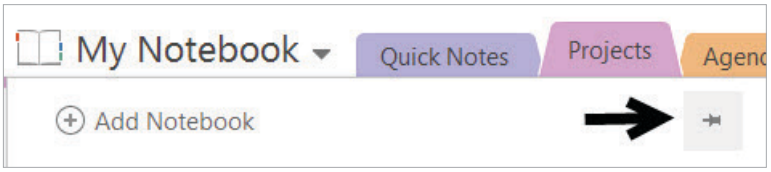
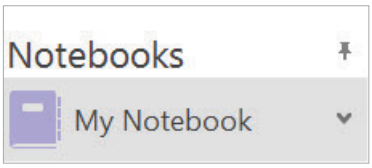
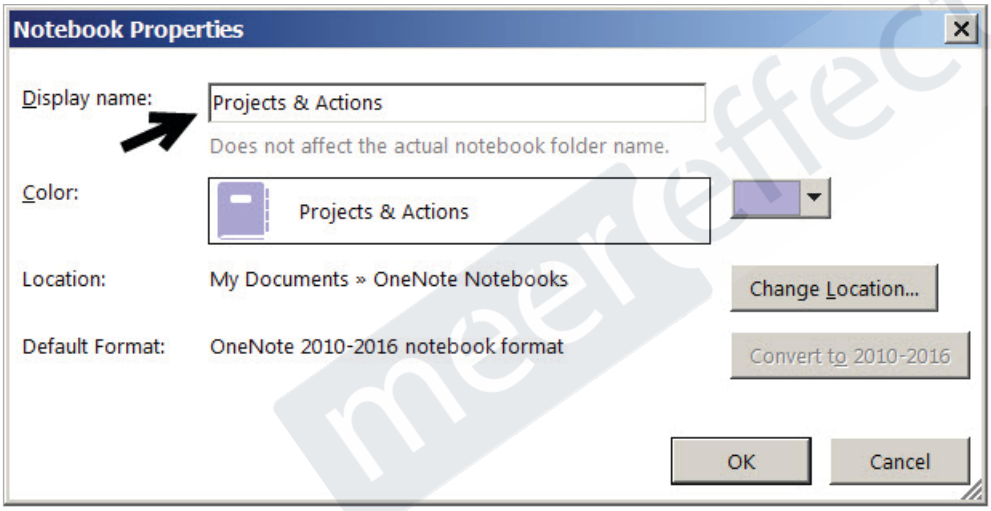
To pin the menu, click a Notebook name (such as “My Notebook”) to display the drop down and click on the pin icon:



2. Now, let’s create a Notebook to hold your lists. You should have a default Notebook called “My Notebook” that was set up for you by default when you installed OneNote.



If you are using OneNote for the first time, use that Notebook, but rename it to “Projects & Actions” by right-clicking on the Notebook name in the side panel, selecting Properties, and changing the Display name to Projects & Actions.



If you have already been using OneNote and have things populated in that Notebook, create a new one to have a fresh start. To create a new Notebook, Click File > New.

Choose a location for your new Notebook, such as OneDrive, This PC, or Add a Place. Creating your new Notebook on OneDrive has the added benefit of sharing Notebooks and emailing to OneNote, which can’t be done if you choose to create it on your own PC. We’ll explain more about those options later in the Guide. If you’re not sure which option is best, save to your PC now, and you can always move a Notebook later if you decide to move it to OneDrive.

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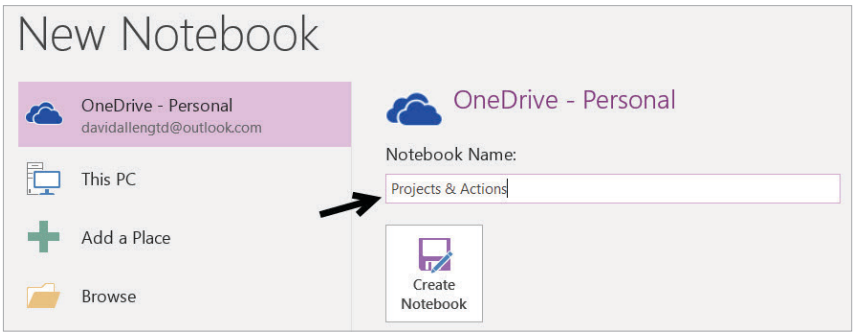
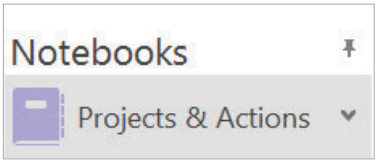
Assign the name “Projects & Actions” and click the Create Notebook button to save the new Notebook.



Your new Notebook should now be listed in the side panel.

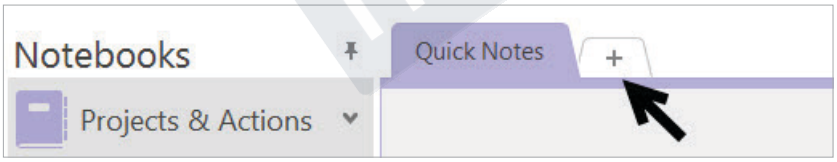


If you ever need to delete a Notebook, you need to do it through your file structure (like My Documents or OneDrive). It cannot be done directly in OneNote. We recommend searching on the phrase “deleting Notebooks” in OneNote Help for detailed instructions on how to do this.

CREATING SECTIONS

Now that you have the Projects & Actions Notebook set up, create Sections to represent individual lists within that Notebook.

1. Click on the Projects & Actions Notebook in the left side panel.
2. Click on the + in the Sections bar or the keyboard shortcut (or Ctrl + T).



3. Type the name of the Section (list name) to add. Start with Projects. Press enter/return to save the Section (list) name. Press or (Ctrl + T) again and enter the remaining suggested lists for this Notebook one by one. The starting set of lists we recommend are:

Agendas	Computer	Office	Someday/Maybe
Anywhere	Errands	Waiting For	(or simply Someday)
Calls	Home		Projects

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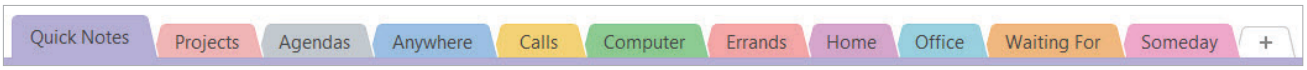


We'll go into more details about the purpose and give examples of what goes on these lists later in this chapter.

To change the color of a Section tab, right-click on the list name, choose Section Color, and select a color.

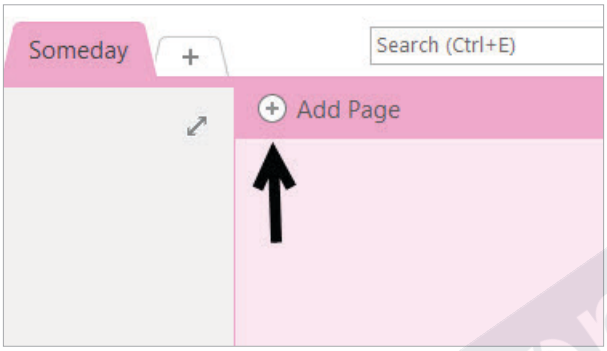
Throughout the Guide, we will mostly refer to these as "lists" instead of Sections.

CREATING PAGES

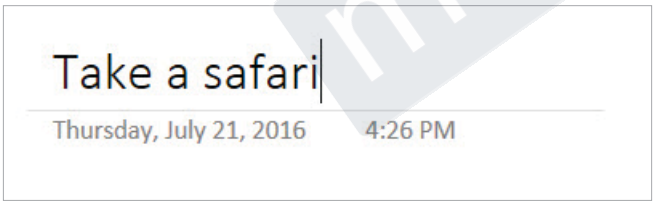
Now that you have lists set up, you will be creating items to add to those lists, using the Pages function in OneNote.

1. Click on one of the lists you just set up, such as Someday/Maybe.

2. To add a new item to that list, click on +Add Page in the right-panel or (Ctrl + N) to create a new Page.



3. Type a name for an item on your list in the canvas area of the new Page where the cursor is blinking. For example, "Take a safari".



4. Your new Page is automatically saved. You will see it in the right-side panel. Eventually, this side panel will have many items that represent items on your lists.

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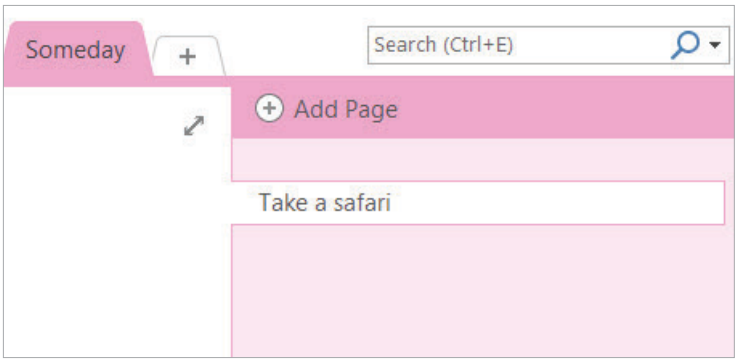
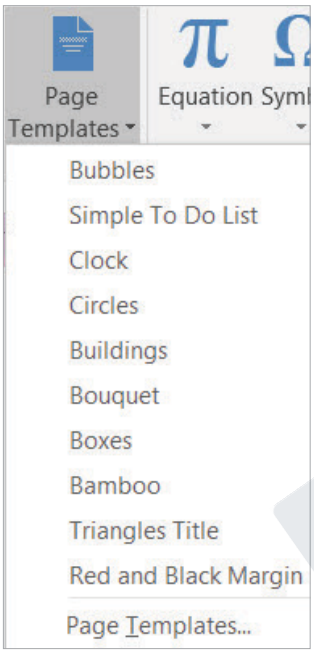


One other option you may find useful for inserting new pages is to use a OneNote template. Click on the Insert tab in your ribbon and choose Page Templates. Those may be more structured than you want or need, but good to know they are an option. Page template might be a useful option if you want to capture notes/ideas/plans in a particular way for a project.



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We'll spend more time in the next section populating your lists, so don't spend too much time on this yet. Just enough to get familiar with how Pages are created.

CREATING NOTES

Notes capture more details for any item on a list. You won't need these for all of your list items, but it can be a handy option when you want to capture background information, project support materials, etc.

Click on an entry for a list, such as the Take a Safari entry you used in the previous example. The large white canvas on your screen is where additional Notes are captured.

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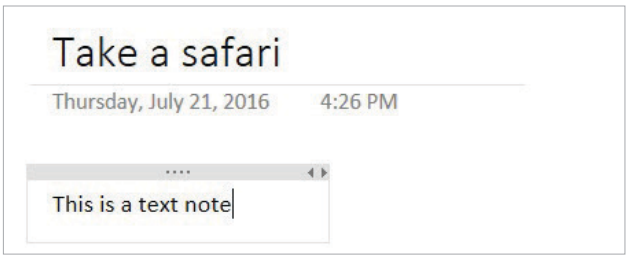
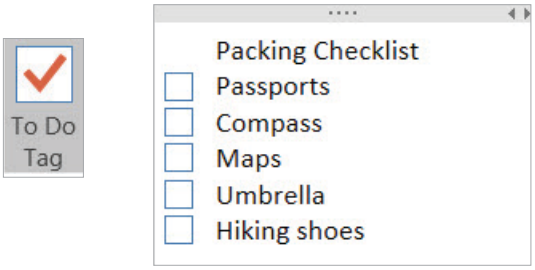
The creative thing about Notes is that there many different types of entries you can make there. Here are a few options:

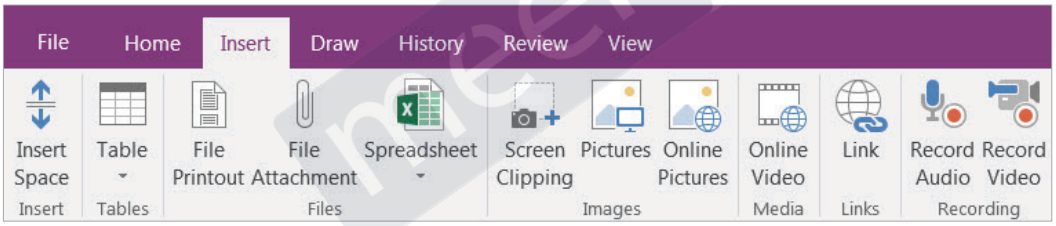
Text Click anywhere on the white canvas and start typing a text note.



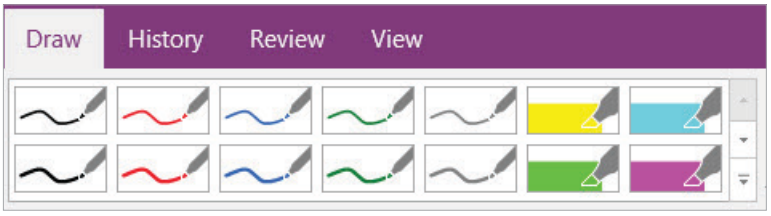
To Do Tag Click the To Do Tag button under the Home tab in the ribbon to insert a list that resembles a To Do list format with checkmarks you can check off.



Attachments Click on the Insert tab on your ribbon to see options for adding a variety of different attachments, such as photos, documents, audio/video clips, and more.



Draw Click on the Draw tab on your ribbon to see options for drawing a note on the canvas.



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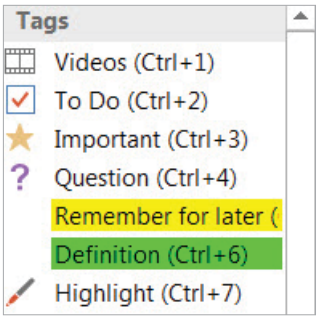
Tags Browse through the tags section on the Home ribbon to see options for inserting tags. While many of the provided tags may be more effort to add than the value they provide, you may find tags handy for linking projects to their related actions. We talk more about customizing tags later in the Guide.



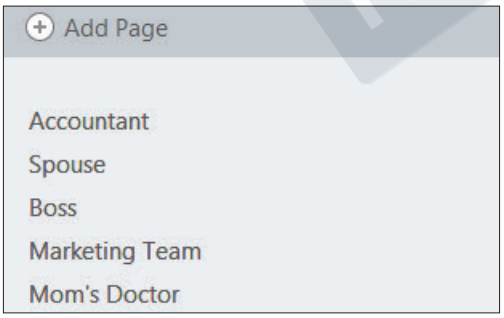
Now, we'll go into greater detail about what goes on these lists.

EXPLANATION OF THE COMMON GTD LISTS

AGENDAS This list tracks the topics and agenda items for people you interact with regularly. For example, if you have a standing meeting with a particular team, and want to capture agenda items to bring up at the next meeting, this is the place to capture them. The Agenda list is not for tracking next actions that you need to take related to that person or team (for example, a call you need to make to that person, which would instead go on your "Calls" list). Once you're on the call, you may refer to the Agenda list for that person, but it's the Calls list that is triggering the action to make the phone call, not Agendas.

To create an agenda for a particular person, open the Agendas list and click + add page in the panel on the right-hand side of the OneNote window, or use the keyboard shortcut (Ctrl + N).

Then, enter the name of the person or group for which you want to create an agenda (e.g., Boss, Spouse, Marketing Team). See example below:



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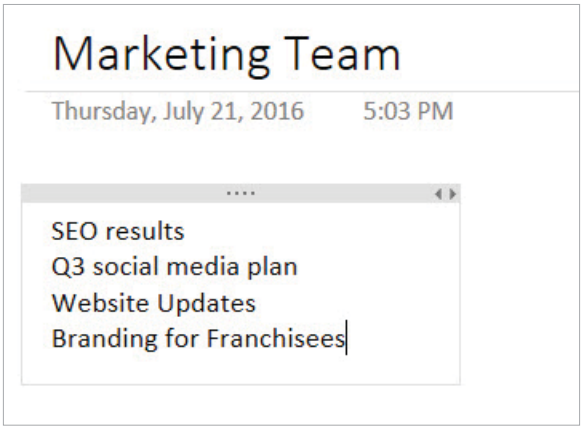
To capture specific items for that Agenda list, enter those in the note field for the entry. The note will remain static, as long as you have a need for agenda items for that person, whereas the note field will be dynamic, as your agenda topics for them change.

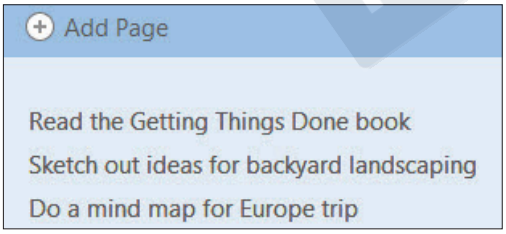


You could easily have a dozen people and meetings that you are tracking this way—your direct reports, your boss, your assistant, your spouse, the weekly staff meeting, the monthly board meeting, etc.

Some people have so many items for just one person or team that they create an entire list (Section) for them, rather than park them as an entry under the Agendas list. Just be careful you don't create so many lists that it becomes difficult to find what you need and keep them current.

Go ahead and capture any new agendas as new Pages under your Agendas list, as placeholders, that would make sense to you. Click on + Add Page or use the shortcut keys (Ctrl + N) to create a new Page.

ANYWHERE An action that can be accomplished, without any restriction about where it's done, would go on this list. Notice in the example below that all the next actions on this list start with a verb. That is the recommended best practice for all of your next actions entries, so that when it comes time to choosing what to do; you've already done the thinking about what your action is.



Go ahead and capture any new items for your Anywhere list that come to mind.

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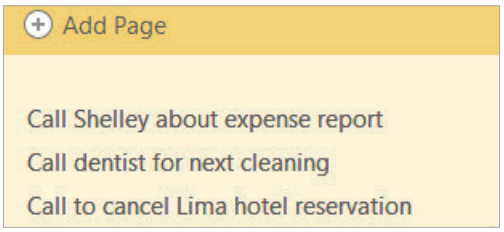
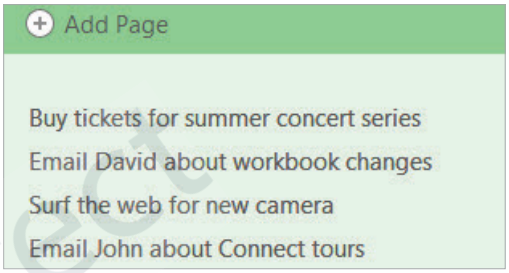
CALLS Place reminders of calls you need to make in this list, if they can be made from any phone. If a call requires a specific location instead (like home or office,) we recommend putting the action in one of those lists instead. If the phone number is not already in your contacts, then add it to the subject line, so you're ready to go when you're ready to make the call.



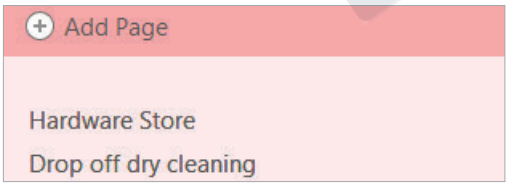
Go ahead and capture any new items for your Calls list that come to mind.

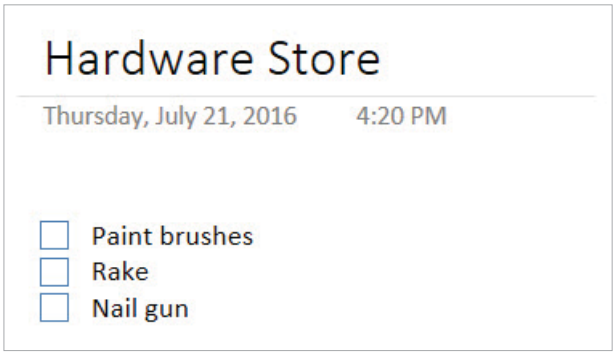
COMPUTER If the action requires a computer (e.g., emails to send, documents to edit or draft, spreadsheets to develop, websites to visit, data to review, etc.), add it to this list. This list then comes into play whenever you are at your computer(s) with any discretionary time. Even if you only have a computer in the office, it's still convenient to have this list separate from your Office list of things to do, because you wouldn't need to look at this list when you are looking for non-computer things to do. Many people these days also like to have a separate Computer list just for email next actions, given their volume.



Go ahead and capture any new items for your Computer list that come to mind.

ERRANDS This holds reminders of things that you need to do when you are "out and about" (e.g., take something to the tailor, buy something at a store, etc.). If you are likely to think of more than one thing to do or get at one of those locations (like the hardware store), make "Hardware Store" the Subject and put your running list of things to get/do there in the notes field.





If you are a regular road warrior you might consider having two errands lists—one for things you could do anywhere, in any city, and one for errands that need to be completed where you live.

Go ahead and capture any new items for your Errands list that come to mind.

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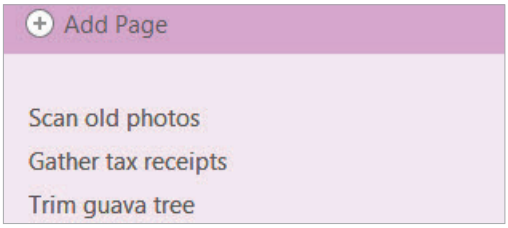
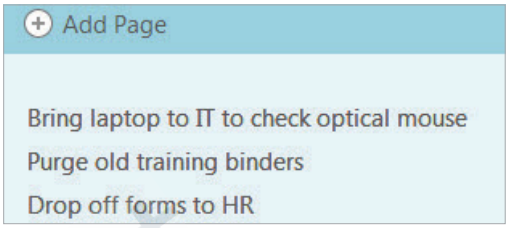
HOME This list is for next actions that have to be done in your home environment (e.g., gather tax receipts, repair the cabinet door, organize old hard copy photos, etc.).



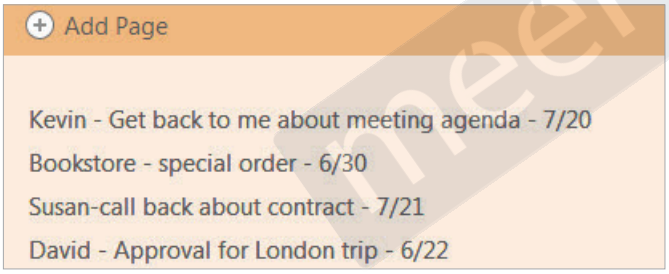
Go ahead and capture any new items for your Home list that come to mind.

OFFICE These are the next actions that require you to be at your office, such as calls that you have to make from your desk because of the materials or equipment (like your laptop) you need for the call, purging old printed files, scanning documents on the office scanner, etc.



Go ahead and capture any new items for your Office list that come to mind.

WAITING FOR This list keeps track of all the actions, projects, and deliverables that you want to happen, but which are someone else's responsibility. It could be something you've ordered that hasn't come yet, something you've handed off to your assistant for which you're waiting on a response, or something your boss is supposed to be finding out before you can move forward on a key project.



We suggest adding the date you started waiting in the description of the item. This can be helpful when deciding when it's time to follow-up again, if they have not responded. The Waiting For list should be reviewed as necessary (at least once a week in the Weekly Review) triggering appropriate actions on your part to follow up, light a fire, or just check the status.

Go ahead and capture any new items for your Waiting For list that come to mind.

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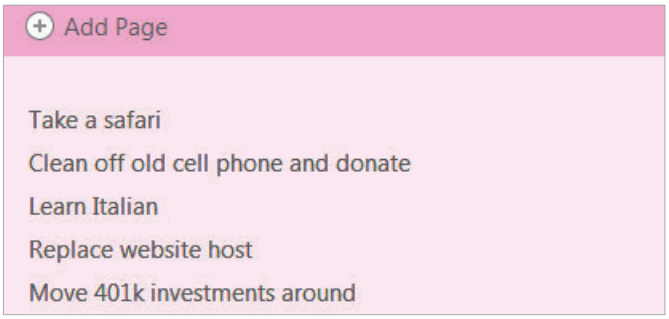
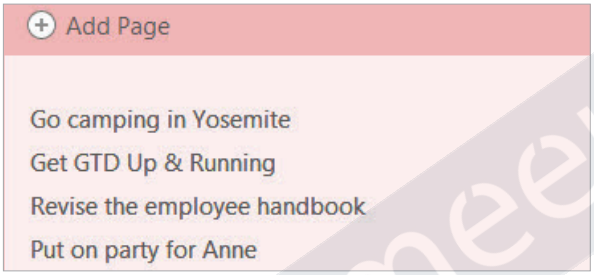
SOMEDAY/MAYBE These are the things you might want to do at some point in the future, but with no commitment to move on them at present. They could represent next actions or projects that were current at one time or not. Many people find they triage things onto and off the Someday/Maybe list when their priorities shift. Your only commitment to items you put on the Someday/Maybe list is that you will review the choice regularly in your Weekly Reviews. That should give you the freedom to capture onto this list, without the stress of feeling like you've made a commitment you may not have the resources to take on.



Go ahead and capture any new items for your Someday/Maybe list that come to mind.

PROJECTS The Projects list tracks any of your desired outcomes that require more than one action step to complete, which you expect to be done over the next 12 months. Projects should always have a defined end point.



Any notes you have about the project, also known as your project plans/project support, can be added to the notes field for each project on the list. While this notes field may not be robust enough to capture all of your project details, nor will it make sense to transfer everything to this location (such as all of the emails also related to the project), it will be useful for quick bullet lists of notes, files, milestones, and "future" actions you want to capture. The current Next Actions and Waiting Fors for the project are not tracked in this note field, but on those lists.

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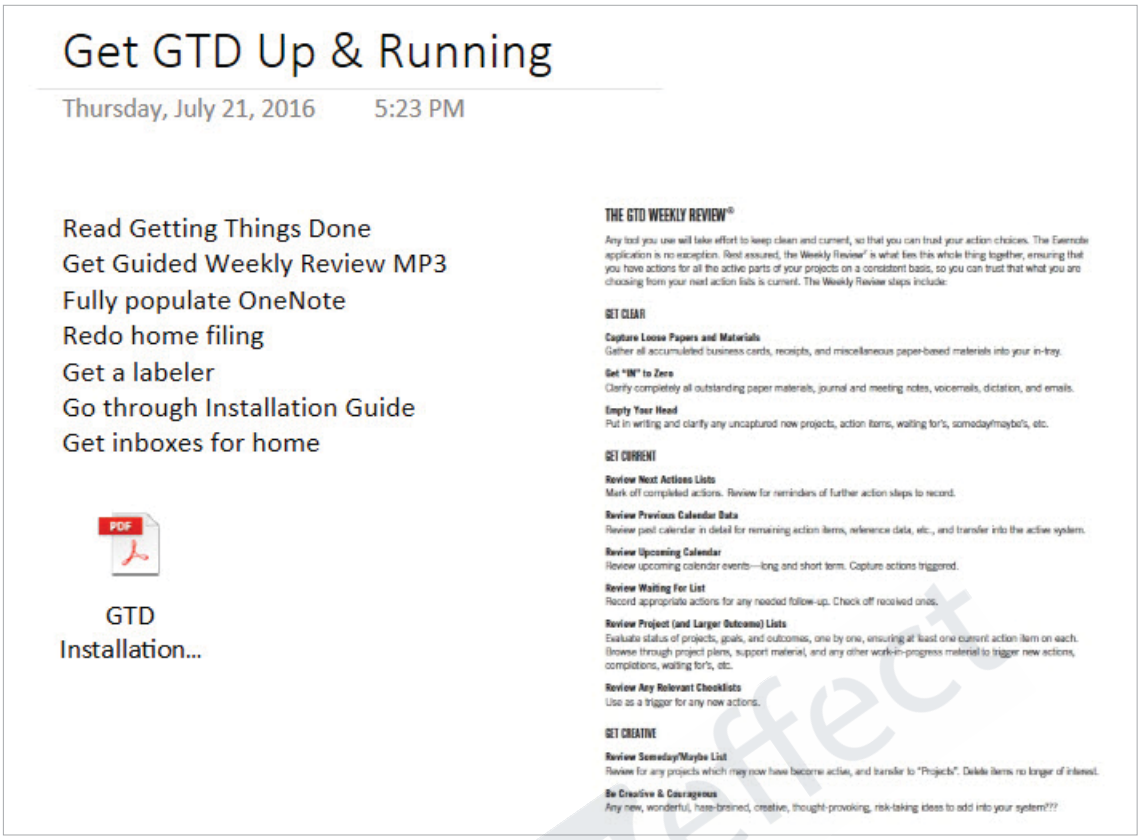
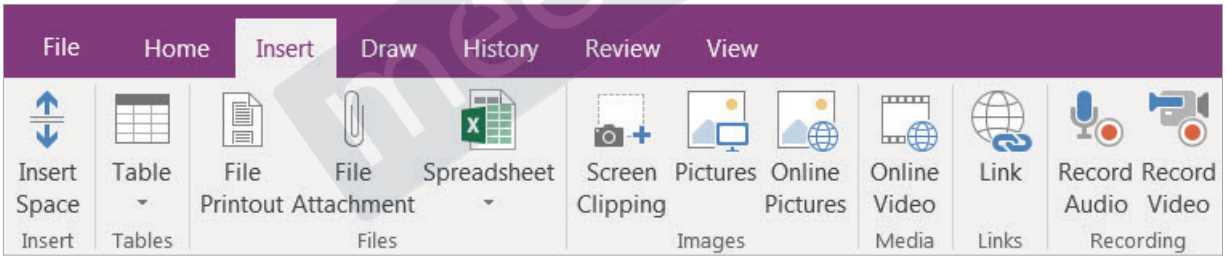
Example of Project Plans captured in the notes field of a list item:



To insert attachments into the note field, click Insert in the ribbon and select the type of item to insert:



Go ahead and capture any new projects for your Projects list that come to mind.

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LINKING PROJECTS TO THEIR RELATED ACTIONS

Sorting next actions by context, not by project, can initially seem awkward. Some people are used to having multiple files, piles, notepads, documents, and spreadsheets related to a project, with next actions for the project buried amongst all of that information. Next Actions lists don't replace project plans—we would just call that data "project support", and in our experience, it rarely works to have current next actions buried among project support for day-to-day action management. Think of the last time you had 20 minutes free and decided to work on a key project. How easy was it to dig through your project support to find the immediate next actions based on the tools, people, and places available to you in the moment? It was probably more repellent to you, especially if you knew there was still thinking to do from the project support.

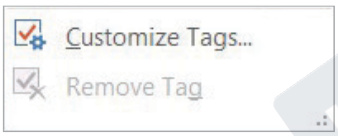
When your next actions are already defined and sorted by context, you can move more quickly, more easily, and more in sync with how you are naturally choosing what to do first—by context. Then project support remains the parking lot for actions that are incubated for future action. You can always add a keyword for the project in your next action or waiting for description. That way, you can rely on the powerful OneNote search function (Ctrl + E) to pull together related information.

USING PROJECT TAGS

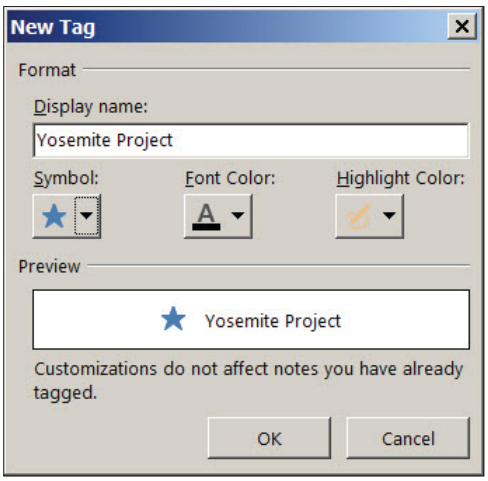
You can also use tags for a specific project and search on that tag. For example, you could tag the project, and all of the related next action and waiting for items. Then, when you search on that tag, you can see everything related to the project in one quick view.

To create a project tag, go to the item you want to tag.

Under the Home tab > Tags in the ribbon, click on the more arrow next to the tags box and choose Customize Tags.



Click the New Tag button. In the window that appears, give your tag a name. You can also assign a symbol, and change the font if you want. Click OK twice to return to the item you want to tag.



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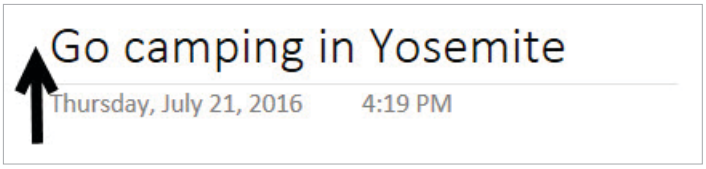
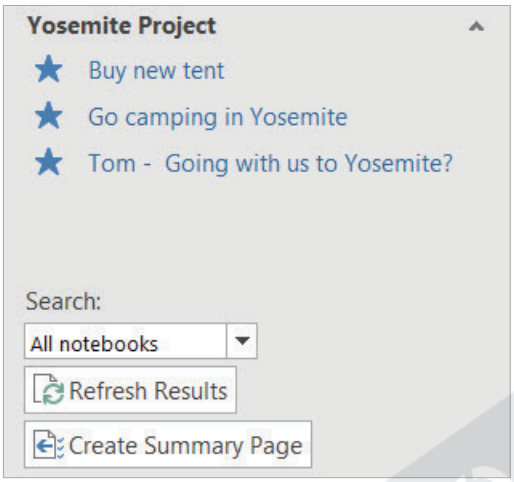
Put your cursor at the beginning of the text to tag, such as the project name.



Click on your new tag name in the ribbon and click OK. The symbol for your custom tag will appear next to the text where you placed your cursor. You won't see the tag name, just the symbol.

If you wanted to see everything related to that tag, which can be very handy during the project review step of your GTD Weekly Review, click Find Tags in the ribbon.

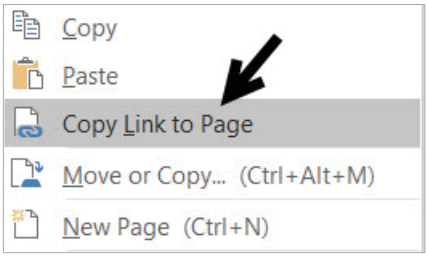
Select Group Tags by Tag Name and find your tag in the results:



You can go to any entry in your tag search results by clicking on the entry.

USING HOTLINKS

Another way to link your projects to their related next actions is to add a hotlink for the project to the note field of the next action. That will give you one-click access back to the project. To create a hotlink, right-click on the project in your Projects list and choose Copy Link to Page:



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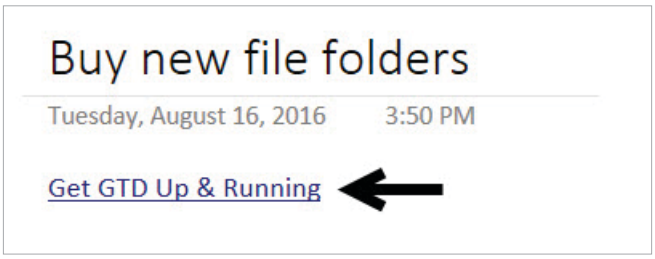
Then, find or create the related next action and paste that hotlink into the note field of the entry. OneNote inserts the link as the name if the linked entry, in this case the related project called "GTD Up & Running."



Clicking on the link will open the linked project.

Just be careful that whatever additional criteria you add for creating new entries, like creating and adding tags or hotlinks, does not become a burden or requirement. You may find tags or hot links useful for one project, but overkill for another. It's easy to let a feature like tags become unwieldy, so watch it carefully to ensure it's helping your productivity and not hindering it.

LINKING ONENOTE TO OUTLOOK®

If you are also using Microsoft Outlook, you may find value in linking some of your Pages (list entries) in OneNote to your Task lists in Outlook. While it would be overkill to link all of your lists, this feature could be useful for linking your projects and related project support in OneNote to the related project next actions stored in Outlook. In other words, OneNote could store your project support (e.g. plans, notes, future actions) in Notebooks and/or Pages and Outlook could track your tactical next actions on your Task lists.

Before we get into how this is done, we want to encourage you to consider this integration carefully in terms of whether it will be a productivity enhancement for you or not. What would be the benefit to linking for the time it will take you to create and update the linking? Do you have a clear plan in mind about what will be stored where? Could you see yourself taking the time to maintain information in both places? If any part of you doubts that you will keep the data in both apps clean & current, because you are not doing regular Weekly Reviews now, we do not recommend diving into this integration.

NOTE: If you're using a version of OneNote earlier than 2016, you may need to enable this integration in OneNote and Outlook under File > Options > Add-ins. Outlook 2016 users should find Outlook integration OneNote functions automatically enabled in the ribbons of both programs.

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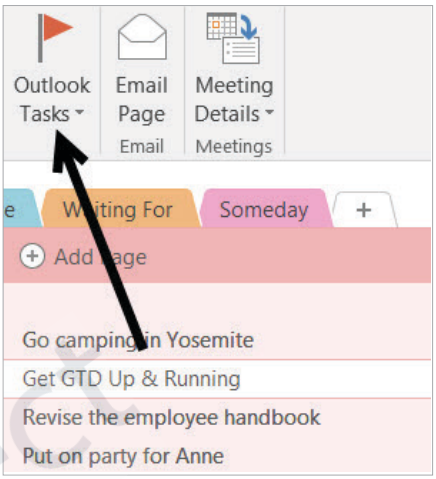
THERE ARE THREE WAYS TO CREATE A LINK BETWEEN ONENOTE AND OUTLOOK:

- Create a new Outlook Task from a OneNote Page (i.e. pushing into Outlook)
- Create a new Page in OneNote from an Outlook Task (i.e. pushing into OneNote)
- Copy a hotlink from a OneNote Notebook or Page and paste it into an Outlook Task (i.e. pulling into Outlook).

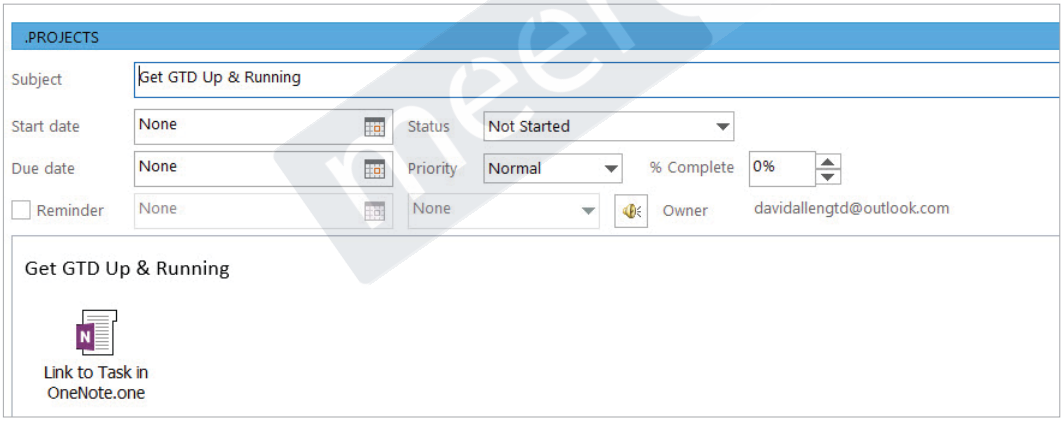
OPTION ONE: CREATE A NEW OUTLOOK TASK FROM A ONENOTE PAGE



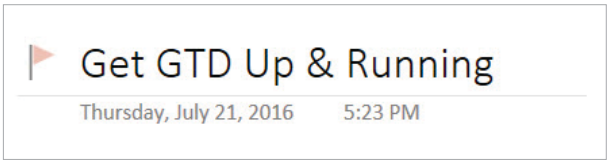
Let's say you've created a project in OneNote called "GTD Up & Running" and you want to add that as a new project in Outlook. To copy the entry from OneNote to your Outlook Task list, click on the Page in your right side panel. While the item is highlighted, use the shortcut keys Ctrl + Shift + K or click on the Outlook Tasks icon in the ribbon under the Home tab.

If you choose the icon in the ribbon to create the task, select the due date flag for the item (or Custom for no due date.) Do not add a due date for the sake of a due date. If you add a due date to all of your items, even when the due date is not real, you'll start to lose trust in knowing which ones are true due dates.

An Outlook Tasks window appears with your list item automatically inserted in the subject line. Outlook does not even need to be open in order for this to work. Edit the subject line if needed, assign the appropriate category and due date. Click Save & Close when done.



In OneNote, a flag appears next to the Page's subject letting you know this is a linked item in Outlook.



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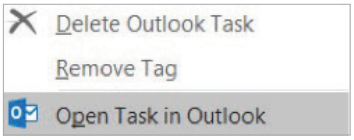
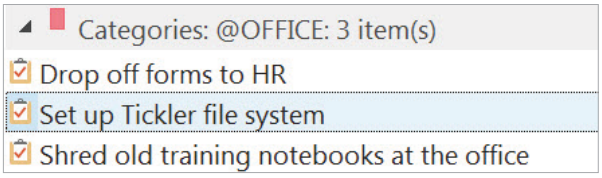
To see how it appears in Outlook, right-click on the flag and choose Open Task in Outlook.



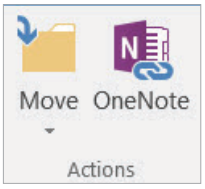
OPTION TWO: CREATE A NEW PAGE IN ONENOTE FROM AN OUTLOOK TASK

From Outlook Tasks, you can also send items over to OneNote as a list item (under a Section), or within an existing list entry (under a Page). This might be useful if you capture a Next Action in Outlook and want to add it to the related project plans/project support in OneNote.

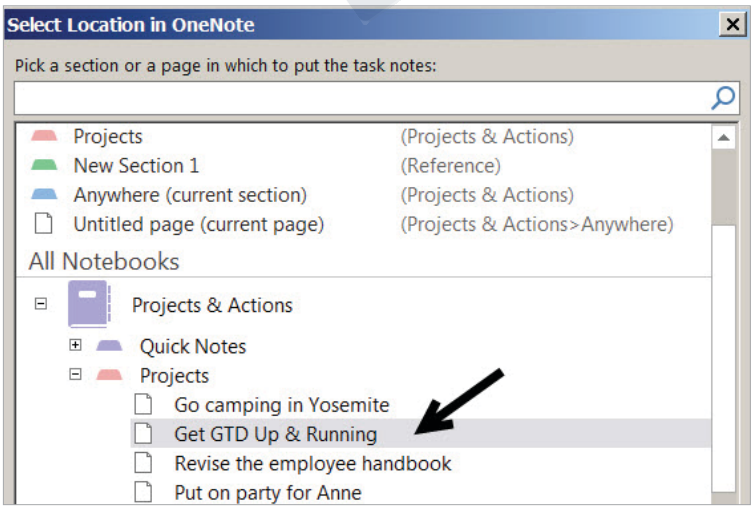
Highlight the Task in Outlook. In this example, we have created a next action related to our GTD Up & Running Project:



Click on the OneNote link icon in the Actions section of the ribbon under the Home tab or choose OneNote from your right-click menu.



A window appears giving you options for where to organize the item in OneNote. Choose your destination and click OK. In this example, we want to add this as a note to the GTD Up & Running project that already exists in OneNote:



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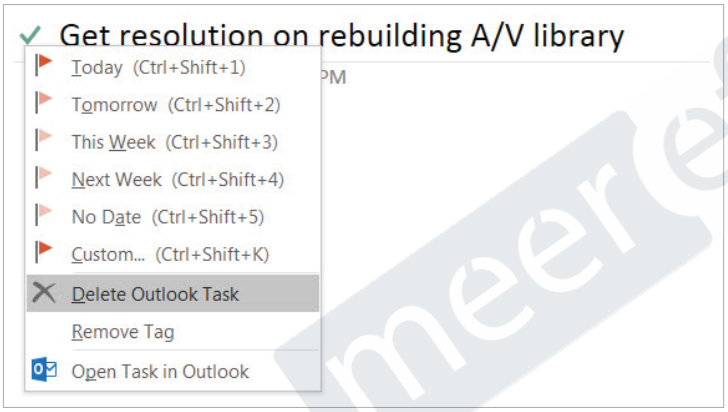
To see how it appears in Outlook, highlight the item in your Outlook Tasks list and click on the OneNote link icon in the ribbon again. This time, because it's already linked to OneNote, instead of showing you a drop-down menu it opens the item in OneNote.

How OneNote and Outlook handle deleting and marking items complete

Using either option one or two described above, marking an item complete in Outlook Tasks marks the item complete in OneNote and vice versa. For example, if you check off an item in Outlook as done, it changes the flag in OneNote to a checkmark:

If you delete a Task in Outlook, you will need to delete it manually in OneNote. However, you can delete Outlook Tasks in OneNote by highlighting the item in OneNote, right-clicking on the flag or checkmark next to the item subject, and choosing Delete Outlook Task.



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OPTION THREE: COPY A HOTLINK FROM A ONENOTE NOTEBOOK OR PAGE AND PASTE IT INTO AN OUTLOOK TASK

The third option is copying a link to the entry in OneNote and pasting that into an Outlook entry, as we described earlier in the section on linking projects to their related actions. This option allows the most flexibility and avoids the sometimes clunky and forced nature of the linking functionality described in the first two options. With this third option, you are simply creating a hotlink to the OneNote item, for quick access back to it.

Working with our same GTD Up & Running project, let's say you want to connect any next actions you create around that project in Outlook to the project entry in OneNote. Find the project in OneNote. Right-click on the entry and choose Copy Link to Page.

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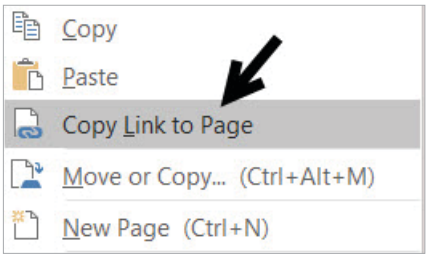
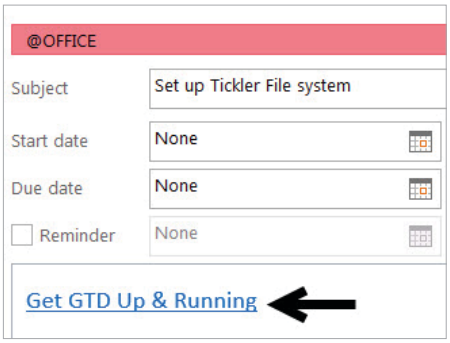


Go to Outlook, create or find the Task to insert your hotlink, and choose paste. The name of your OneNote entry is pasted into Outlook. Clicking on the entry brings directly back to OneNote.

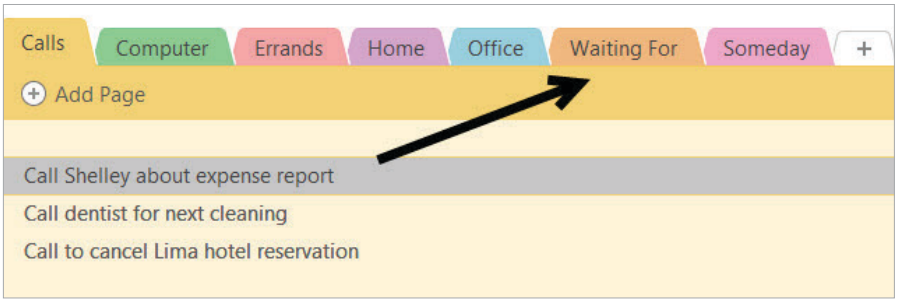


Remember, if you are going to use this integration, don't overwhelm yourself by linking for the sake of linking. If it helps your productivity—great. If it starts to feel like "work" maintaining the linking and it isn't giving you the map you need to see your inventory of commitments—let it go.

MOVING ITEMS BETWEEN LISTS

When you are working your GTD system, you'll be moving items between lists frequently. For example, you may have a next action in your Calls list to make a call. If you reach their voice mail, but need to track that the person calls you back, that item would get reassigned to the Waiting For list. Or, you may have a Project that has changed in priority and becomes a Someday/Maybe, or vice versa.

To change the list assigned to an entry, simply drag it from one list and drop it in another. For example, to move a next action from the Calls list to the Waiting For list, drag it from the right panel to the new lists in your Section tabs.



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THE WEEKLY REVIEW TIES IT ALL TOGETHER

Rest assured, the Weekly Review is what ties the whole thing together, ensuring that you have actions on all the active parts of your projects on a consistent basis, largely based on those project support materials, so you can trust that what you are choosing from your Next Actions list is current. See the *Getting Things Done* book or the Methodology Guides in our online store for a Weekly Review checklist.

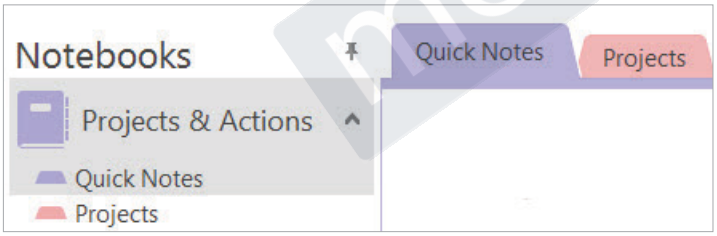
CUSTOMIZING YOUR CONTEXTS

The lists we have suggested should serve as a starting point. You may need more of these or fewer. For example, some people find they want to break out Computer into more specific lists, such as a list just for Email. Executive support staff can often use a context called Meetings to Schedule. Some managers find a Projects–Delegated list useful as a high-level Waiting For list. Or, you may find you don't want to use as many contexts, and a simple list called Next Actions or Next Actions-Work and Next Actions-Personal would suffice for your action lists. Be willing to experiment to find the set of lists that will work best for you.

USING QUICK NOTES

The OneNote Quick Notes Section is like an Inbox that can be used to hold Mind Sweep items that still need to be processed. For example, you may have a thought or idea on the fly, not know exactly what the next action is yet, but you don't want to lose the idea. Or, you may see something on the web you want to get back to and "clip" it into the Inbox. Sending it to the Quick Notes stores the idea until you are ready to clarify it (through the questions on the GTD Workflow Map shown earlier in the Guide) to decide what it means and what you want to do about it.

Quick Notes come already built in to OneNote as a Section in your default Notebook (called My Notebook or Projects and Actions if you changed it earlier).



The Quick Notes Section works the same way your other Sections do, where the Section is called the list name (e.g. Quick Notes) and the items on the list are added as Pages. The difference with Quick Notes versus your other lists though is that these items are unprocessed. You still have not clarified yet what the item is or what you want to do about it. To make Quick Notes work, you'll need to treat them with the same rigor you would your email and paper Inboxes, meaning, process the items in this list down to zero on a regular basis.

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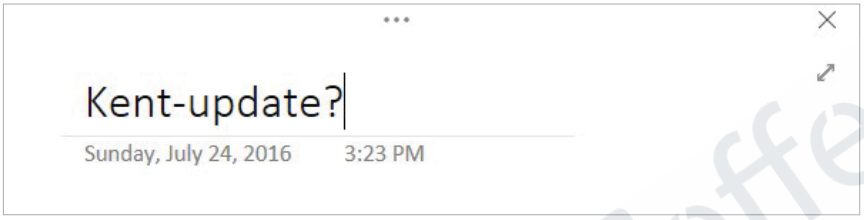
THERE ARE 5 WAYS TO CAPTURE QUICK NOTES

1. Go to the Quick Notes Section (list) and click to add a new Page.
2. Click on Quick Notes from your left side panel.
3. Click on View > New Quick Note in the ribbon.
4. Use the keyboard shortcut Ctrl + Shift + M from anywhere in OneNote.
5. Click on the Quick Note icon in your Windows system tray.

The real power of Quick Notes is that it allows you to stay in the flow of your workflow with minimal interruption, while keeping your mind clear. For example, let's say you're working in your email program. You have a thought you want to capture.

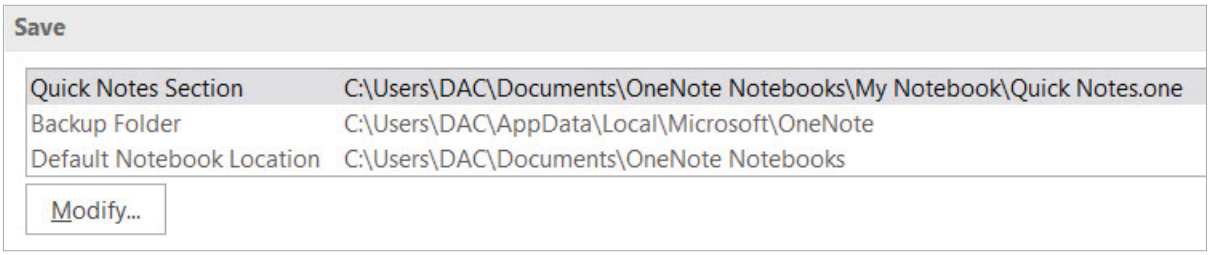
Without leaving your email, use the keyboard shortcut Windows + N, type your thought into the Quick Note window, and press X to save it to OneNote:



In less than 10 seconds you got it off your mind, captured in a trusted bucket for "In", and you're back to what you were working on.

> ***NOTE: Quick Notes can only go to one Notebook. You can, however, change the default destination under File > Options > Save & Backup. Change the Save location for Quick Notes Section by clicking Modify.***

Modifying Quick Notes location:



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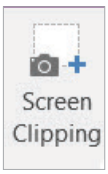
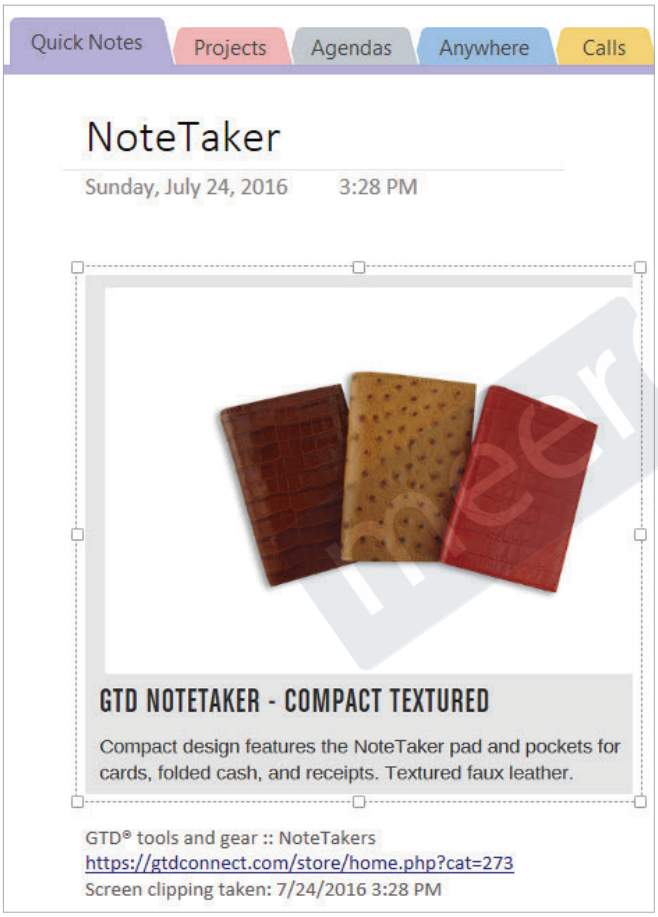
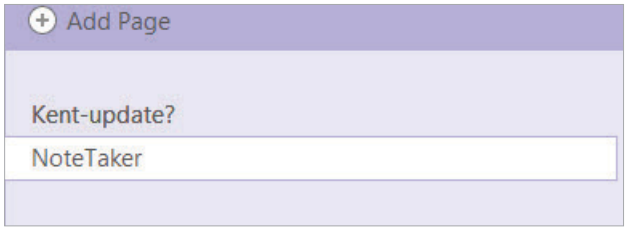
Another handy way to use Quick Notes is for parking Screen Clippings you grab on the web, until you have a chance to process them. For example, if you see an interesting product you may want to check out, take a Screen Clipping of the item by right-clicking on the OneNote icon in your Task bar and selecting Take screen clipping, using the keyboard shortcut Windows + Shift + S.

You'll also find screen clipping in the ribbon under Insert > Screen Clipping.



For example, here is a Screen Clipping of the GTD NoteTaker clipped from the gettingthingsdone.com website as a new Quick Note:





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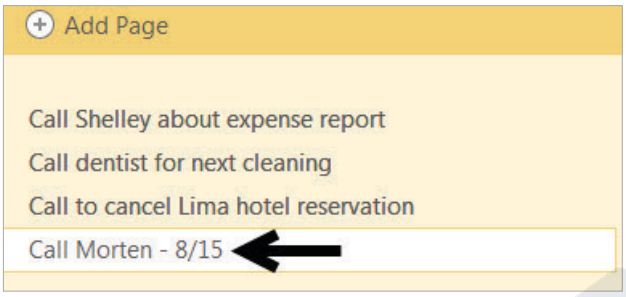
REVIEWING YOUR LISTS

On a daily basis, we recommend reviewing your Next Actions lists (the ones we set up as contexts, such as Calls, Computer, etc.), whenever you get a chance. On a weekly basis, in your Weekly Review, we recommend reviewing all of your actionable lists in OneNote, including Next Actions, Waiting For, Someday/Maybe, and Projects. This will be valuable time spent to acknowledge what you've completed, capture any new next actions, and ensure each project is moving forward.

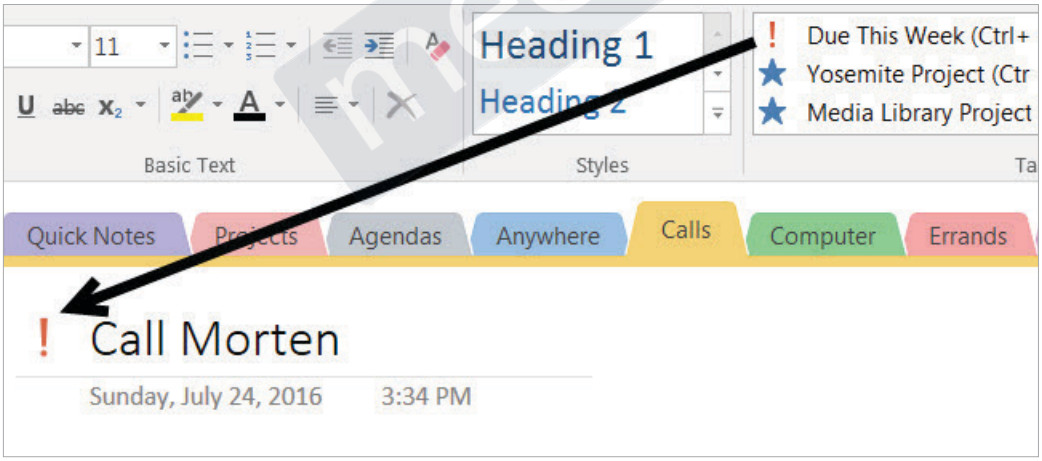
USING DUE DATES

Since OneNote was not built as a traditional list manager, it does not currently include typical list manager functions, like assigning a due by date. There are a few simple ways to work around this.

1. One of the easiest ways is to add the due date to the subject line. See example below:



2. Another option is to create a tag or (tags) that represent due dates. For example, "due this week", "due soon", or "before next trip"—if you travel frequently. See example below:



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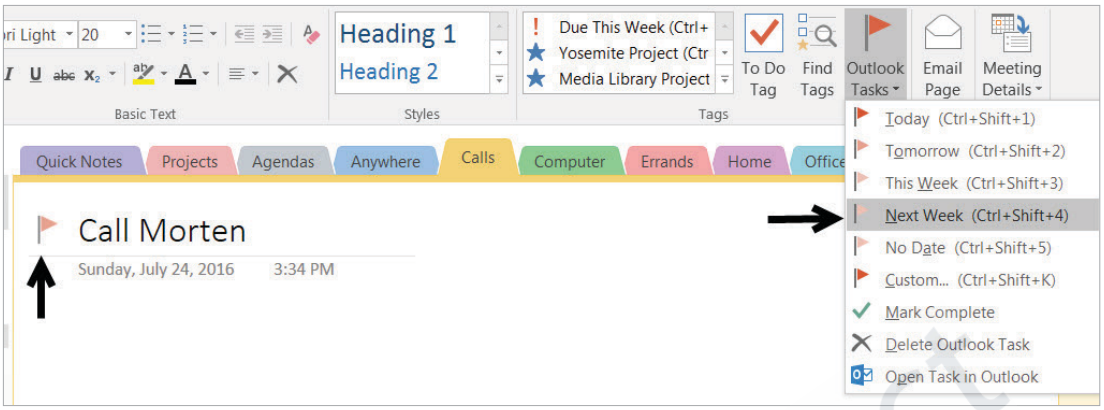
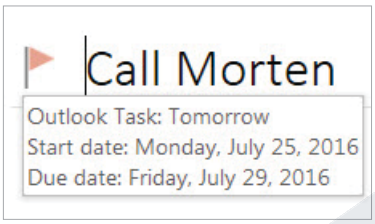
For those tags to work, it means you are actively reviewing the items under those tags with as much discipline as you are looking at your Next Actions lists. Again, use tags if they will benefit your system and not become a burden on your ability to capture new entries quickly and/or become slowed by the requirements of adding and maintaining those tags.

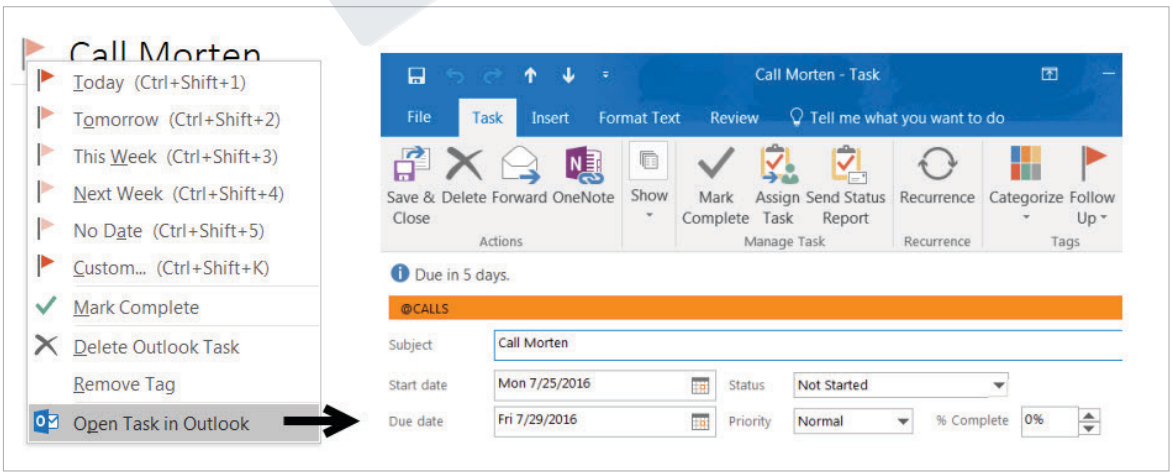
3. If you are an Outlook Tasks user, you can assign a flag to your note in OneNote to create a new Task with that due date in Outlook. To do this, put your cursor on the subject line of your OneNote item to be tagged, then click on the Outlook Tasks icon in the ribbon and choose a tag (or use the keyboard shortcut assigned to that tag).



To see the due date in OneNote, you would have to open the item and hover over the flag.



To see the due date in Outlook, find the item in your Tasks or To-Do List by going to Outlook or hovering over the flag again in the OneNote entry and choosing Open Task in Outlook.



Be sure to categorize the Task you created in Outlook to the correct GTD list (e.g. Projects, @Computer, Waiting For, etc.). Unfortunately, there is no way to assign a category to the note you create in OneNote before sending it over to Outlook. For more support in setting up Outlook Tasks, be sure to get our *GTD & Outlook Setup Guide*.

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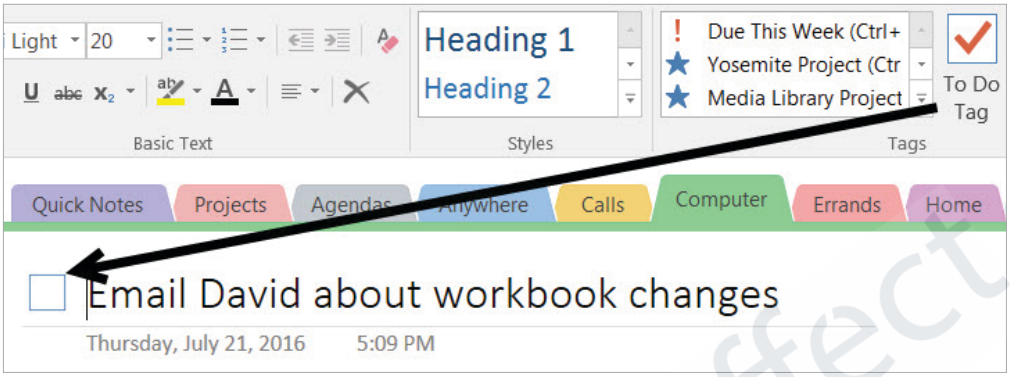
MARKING ITEMS COMPLETE

A challenge with OneNote not functioning as a traditional list manager, like Outlook Tasks, is that you need to get creative on how to mark items complete from your actionable lists. While it's unlikely you need a hold on to everything you complete, we usually find when coaching people that having a record of key projects or anything that would be important to recall as having been done good candidates for keeping in OneNote.

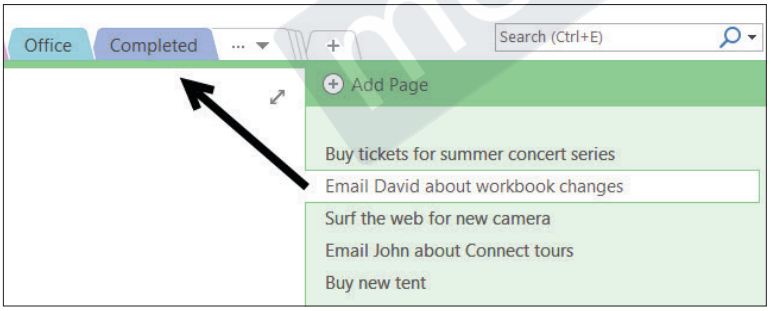
HERE ARE A FEW OPTIONS ON DEALING WITH COMPLETED ITEMS:

1. Add a "To Do Tag" to your OneNote items, which adds a checkbox next to the subject line of the note. To add this tag, put your cursor in the subject line of the entry, then click To Do Tag in the ribbon.



You can then check the box to mark the note as done by clicking in the checkbox. However, the note still stays in your list, and the only way to know that the item is complete is by opening it up.

2. Another creative workaround is to create a list (Section) called Completed and drag/drop completed items to that list.



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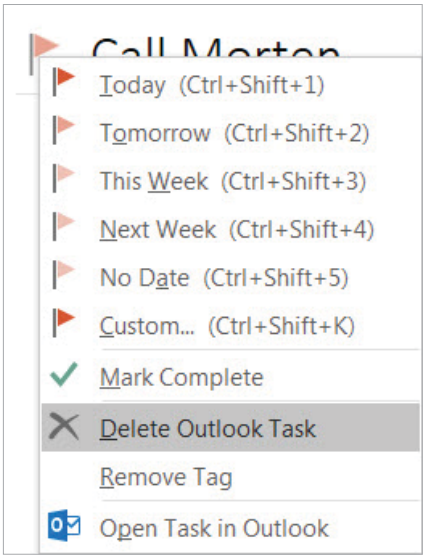
If you are integrating OneNote with Outlook Tasks…

If you mark the item complete in Outlook, it also marks it complete in OneNote and will change the red flag to a green checkmark. You can also delete the Task in Outlook from OneNote by right-clicking on the flag:



For more support in setting up Outlook Tasks, be sure to check out our GTD & Outlook Setup Guide.

USING SHORTCUT KEYS

The ability to capture information quickly can greatly enhance your productivity. There are many functions you can perform in OneNote, using shortcut keys. Visit the Microsoft Support site for a full list of shortcuts for OneNote for Windows.

SHARING FROM ONENOTE

OneNote isn't just for managing your own workflow, you can also use it for collaborating with friends, family, and coworkers.

Here are some practical uses for sharing:

- Collaborating with colleagues on a work project
- Collaborating with family or friends on a personal project
- Sharing meeting notes with your team
- Sending an errands list to your partner/spouse/roommates
- Sending your boss your current Projects list
- Sending your Agenda list to someone before you meet with them

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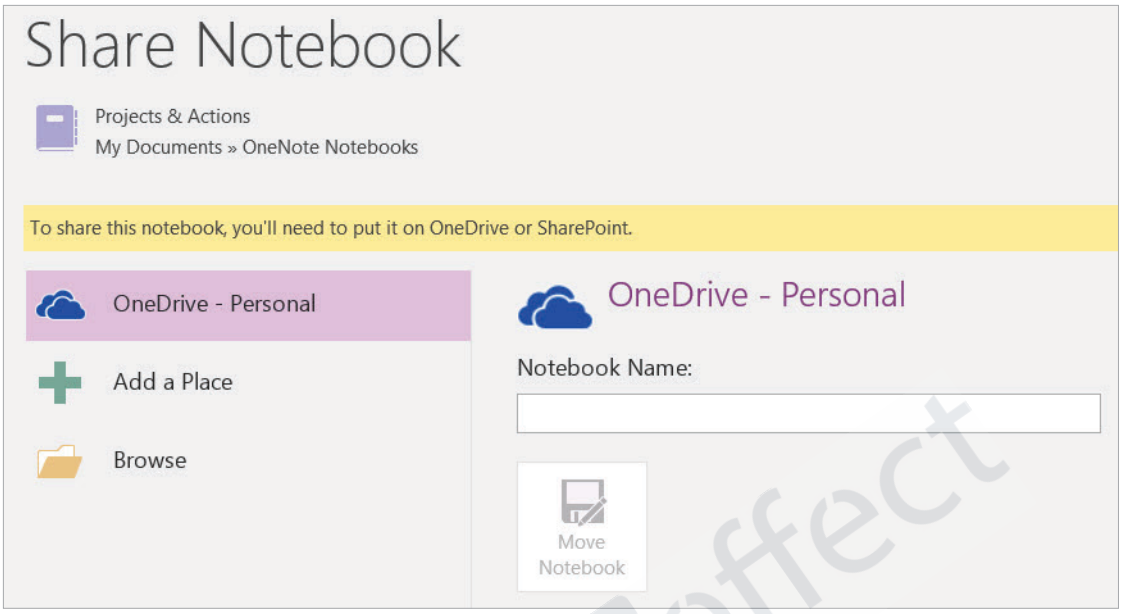
You can share an entire Notebook or email a Page.

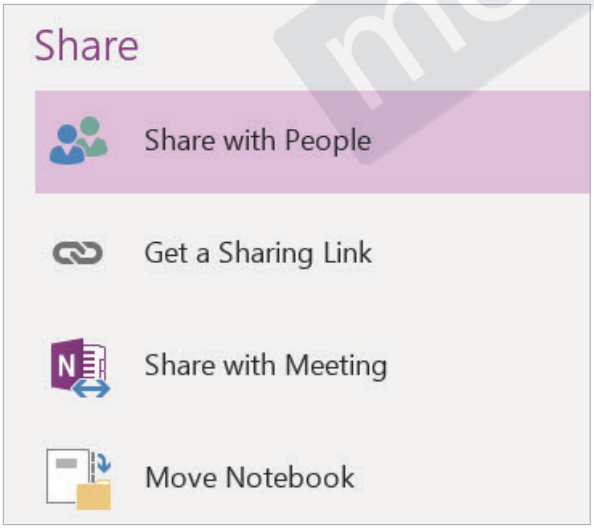
SHARING AN ENTIRE NOTEBOOK:

1. First, to share a Notebook, it needs to be on OneDrive, SharePoint, or your company network. You can't share Notebooks that are only stored on your PC. To move a Notebook, click on the Notebook and select File > Share.



If needed, move the Notebook to a shared location.

2. Once you've moved it to a shared location, then choose who/how you want to share it:



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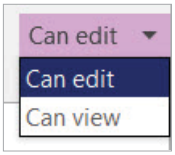
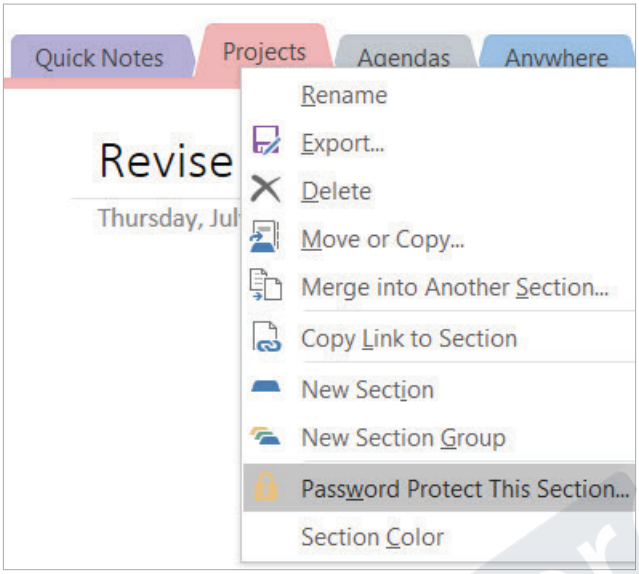
You can select whether others can just view or edit and view.



When you share a Notebook, you are giving others viewing or editing access to the entire Notebook, unless you password protect specific Sections (lists). To password protect a Section, right-click on the section name and choose Password Protect This Section.



Microsoft does not yet give users the ability to share only specific Sections (lists) or Pages (entries on your lists).

Another option to just share the information without giving others access to an entire Notebook is to email a Page.

EMAILING A PAGE:

You can email specific Pages (entries on your lists) from OneNote to someone else, whether they use OneNote or not. There are several ways to do this.

1. Find the Page to share and click Email Page in the ribbon:

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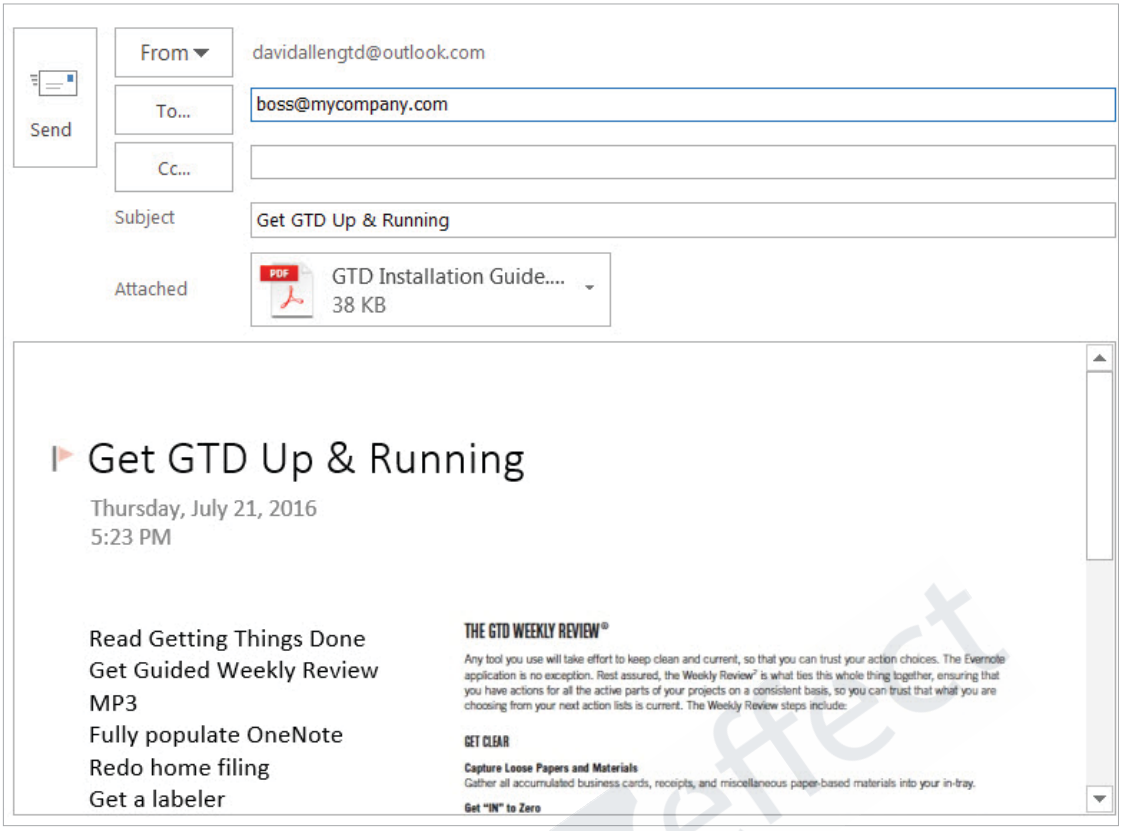
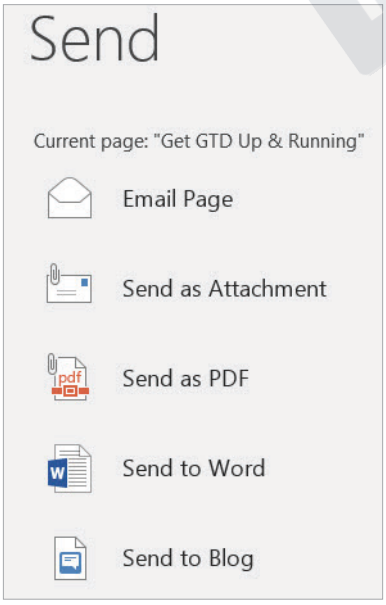
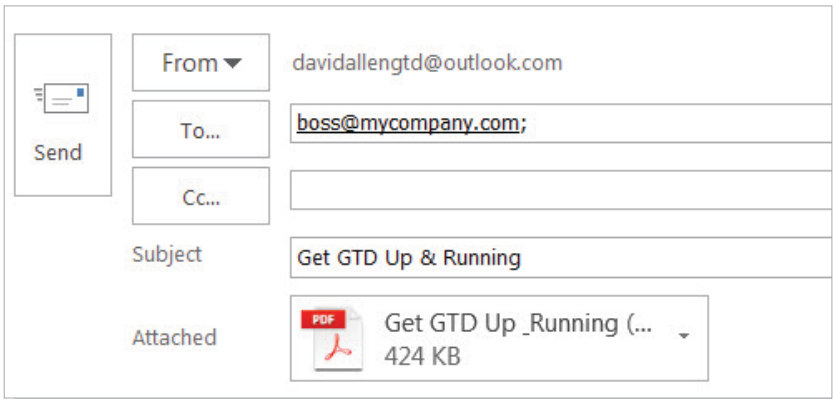
The recipient will receive the note in the body of the email, like this:



OR

2. Find the Page to share and click File > Send. Choose Email Page same as ribbon option), Send as Attachment, Send as PDF, Send to Word, or Send to Blog. Here's how that same Page would be sent as a PDF, where the contents of your Page are packaged in a PDF as an attachment in the email:





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EMAIL

INTEGRATING ACTIONABLE EMAIL WITH ONENOTE

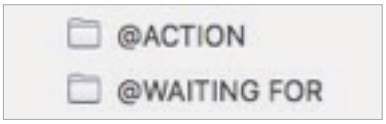
The master key for managing email is the hardest habit for many to change—working from a regularly empty inbox.

It takes less mental effort to operate from a zero base than to leave anything sitting in the inbox. That doesn't mean that the inbox in email is kept at zero—just that it gets there on some regular basis (at least once a week in the Weekly Review). The problem is that most people do not have a system for managing their emails beyond the inbox area, so if they can't move on or finish dealing with the email right then, they will leave it in "in" as the safest place.

TWO OPTIONS FOR MANAGING ACTIONABLE EMAIL

OPTION ONE: USE THE EMAIL AS THE REMINDER

Create @Action and @Waiting For folders in your email program, and use them like an action list. You would not also put those reminders on your Calendar or Next Actions lists in OneNote—the email itself would be the only reminder. That means you need to scan these folders with as much discipline as you would your Next Actions lists and Calendar, for reminders of your commitments. The @ symbol is a trick to push these folders to the top of your email structure for easy access. If the @ symbol does not work in your email program, try another symbol.



People often like this option for the quick win it gives in getting your inbox processed to zero. The downside with this option in email is that you have no place to capture the next action or due date that's associated with that actionable email. So you'll inevitably be doing some "re-deciding" about emails you already decided about, if the next action is not apparent by the subject line.

OPTION TWO: USE NEXT ACTIONS LISTS IN ONENOTE OR YOUR CALENDAR AS THE ACTION REMINDER

Create @Action Support and @Waiting For Support folders in your email program to hold supporting information for actions that are tracked on your Calendar or Next Actions lists. In this case, the folders only serve as storage buckets to hold the information you need to take the action on. You would be reminded of the action when you review your Calendar or Next Actions lists. It's one fewer place to look for actions or waiting for items, whereas the first option adds an additional location to look for a complete view of your reminders.

People often like this second option because all of your reminders will be tracked in as few places as possible. But it does mean you have to take the time to go to OneNote Next Actions lists and define the next action.

Go ahead and create either the @Action and @Waiting For or @Action Support and @Waiting For Support folders in your email program now.

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GETTING YOUR INBOX TO ZERO

Getting your inbox to zero means you have made a decision about what each email means and what you want to do about it. Using the questions from the GTD Workflow Map (pictured earlier in the Guide) you would simply ask:

What is it?

Is it actionable?

NO Is it trash, to file as reference, or to incubate (add to your Someday/Maybe list, calendar, Tickler or Bring Forward file)?

YES What's the next action?

Do now, delegate to someone else, or defer to do myself later?

If **doing** now, handle it in the moment, as long as it takes less than 2 minutes.

If **delegating**, track the waiting for reminder (if you need to track this getting completed) in your @Waiting For folder in email or Waiting For in Tasks.

If **deferring**, track the action reminder in @Action folder in email, Calendar, or a Next Actions list.

If multiple actions, what's your desired outcome?

Track that outcome on your Projects list in OneNote.

We recommend getting your inboxes to zero daily, or at least once a week in your Weekly Reviews.

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EMAILING TO ONENOTE

Another great feature in OneNote is the ability to email information into your OneNote Notebooks.

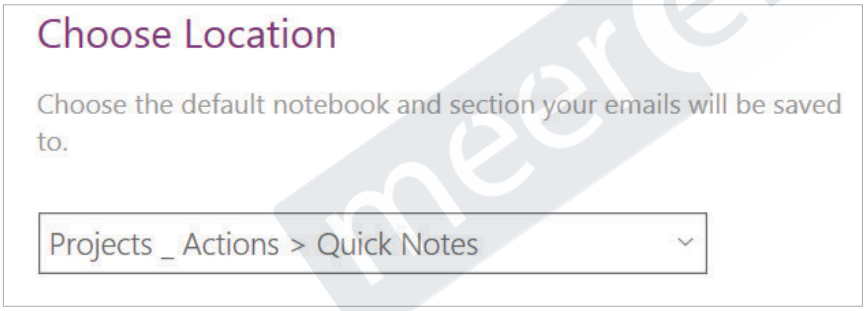
A few ways you might find this useful include:

- Sending Mind Sweep items to your Quick Notes
- Capturing a next action and sending it directly to a Next Actions list
- Forwarding project support to one of your Project Notebooks
- Creating a new project to add to your Projects list
- Capturing reference for your Reference Notebook

1. To get started, go to www.onenote.com/EmailToOneNote and follow the simple instructions for configuring this feature.

2. Select the email address to enable. Any emails you send from this address to "me@onenote.com" will be saved to a Notebook you choose. Save that email address to your address book as a new contact now so it's ready to go when you want to start sending emails. Name the new contact something easy to remember and type, like "onenote", for speedy addressing in the future.

3. Select the default Notebook and Section for your emails. We recommend Quick Notes as the default. Your destination Notebook must be shared on the web or your network. It won't work for Notebooks saved only locally on your computer.



4. Click Save.

5. Go to your email program and send an email to me@onenote.com from the email account you enabled in step 2.

A new Page will be created from your email with the subject line of your email becoming the title of the Page.

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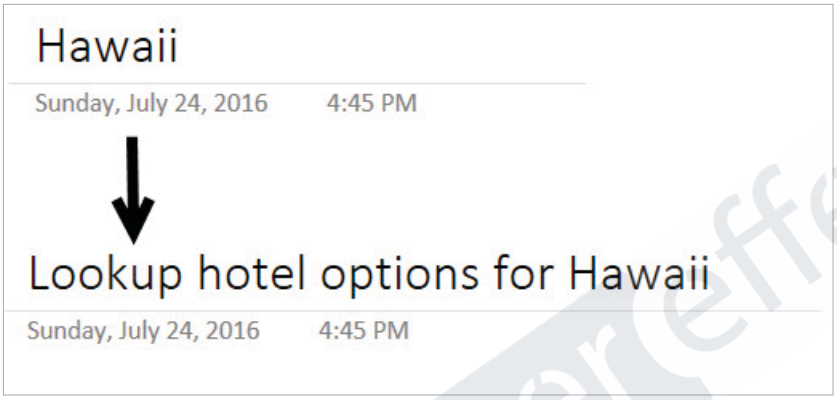
For example, let's say "Hawaii" comes to your mind, but you don't know what you want to do about Hawaii yet. It's simply an unprocessed Mind Sweep item at this point. Send an email to your OneNote account with "Hawaii" in the subject line.

When you are ready to process the Hawaii item, you would ask yourself the GTD processing questions (see the map on page 3) and move that item out of the Quick Notes list and into the appropriate list, with a clearly defined next action.



6. Sometimes you'll also want to add things directly to a specific list. You can do that too, with one small change. For example, let's say Hawaii comes to mind and you know you want to look up flights as the next action. Create a new email, addressed to your OneNote account. In the subject line, type the next action "Lookup Hawaii flights" but add the name of the list with the @ symbol before sending. For example, "Lookup Hawaii flights @Computer". Instead of going to Quick Notes as in the first example, this item will go directly into your Computer list:

This is a great option when you've already clarified your next action and just need to get the item on a list.

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Of course it can also be used for adding new Projects, Someday/Maybe, and Waiting For items too:

We only recommend sending items directly into your Next Actions lists if you have a clearly defined next action. This method is not for capturing unprocessed Mind Sweep items or anything that you still need to decide what it means and what you want to do about it.

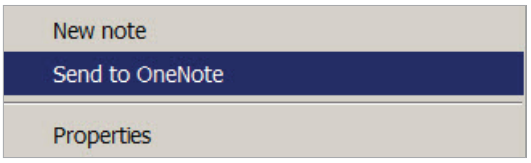
SENDING AND CLIPPING TO ONENOTE

Another option for getting information into OneNote is clipping from your browser. This can be handy if you are surfing the web and see something that you want to capture on a Next Actions list or send to Quick Notes to process later.

For example:

- Send/clip an article you want to read later and send to your Computer list
- Send/clip a product you might want to buy and send to your Someday list
- Send/clip reference information that could be useful in the future and send to your Reference Notebook

If you are using Internet Explorer, right-click on a web page you want to capture and choose Send to OneNote. Select your destination for the information in OneNote and change the subject of the new Page to reflect your next action (or leave as is if you are sending to Quick Notes).



If you are using a different program than IE, right-click on a web page you want to capture and choose Print. Select OneNote as the destination, if it's not already selected. Choose where to save the information in OneNote and change the subject of the new Page to reflect your next action (or leave as is if you are sending to Quick Notes to process later).

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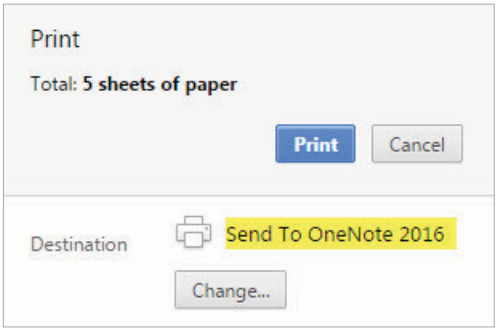
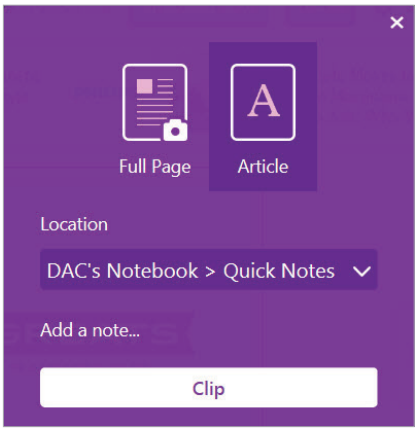


Microsoft also offers a browser extension called OneNote Web Clipper. It is similar to the Send to OneNote option described above, but offers a bit more functionality for what you clip (e.g. full page vs. just the article). You can download the Clipper here: www.onenote.com/clipper.



We found the Send to OneNote option easier to use than the Web Clipper application, but experiment to see which one will work best for you.

CALENDAR

WHAT BELONGS ON YOUR CALENDAR

Outside of OneNote, your calendar is a critical component in your GTD system for reflecting the action choices that need to be done ON a specific day versus those that you see on your Next Actions lists in OneNote, which can be done BY a specific day, or on ANY day. Your daily calendar page should represent the "hard landscape" for your day and will provide a trusted foundation at a glance for moment-to-moment orientation about "what's next?". There are three things that belong on your calendar.

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1. DAY-SPECIFIC INFORMATION Information you want to know or be reminded of that day—not necessarily something to do.

Examples:

- Things that might disrupt your day (server shut-downs, office moves, etc).
- External events to be aware of (marathons, elections, heads of state visits, etc).
- Activities of other significant people of interest to you (kids, spouses, bosses, assistants, vacations, etc).

2. DAY-SPECIFIC ACTIONS Things that need to happen during the day, but not at a specific time.

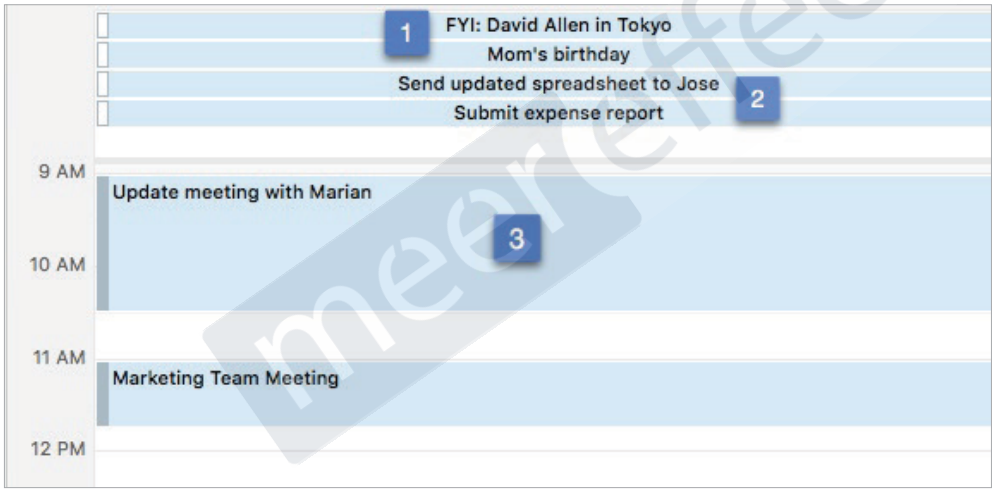
Examples:

- A call you have to make before you leave for the day
- Something that you have to finish and submit by the end of the day
- An agenda you must cover with someone before they leave the office

3. TIME-SPECIFIC ACTIONS Things that need to happen on a specific day and time.

Examples:

- Meetings, appointments, time blocked to work on projects



REVIEWING YOUR CALENDAR

On a daily basis, we recommend reviewing your Calendar for day- and time-specific actions, any chance you get. On a weekly basis, in your Weekly Review, we recommend reviewing your Calendar backward for any "Oh, that reminds me…" items, and forward for any "I need to start prepping for…" items to capture.

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REFERENCE

USING ONENOTE TO STORE REFERENCE INFORMATION

OneNote can manage a limitless number of potentially useful (and fun!) non-actionable simple reference lists and checklists that you would not want to combine with your Next Actions lists.

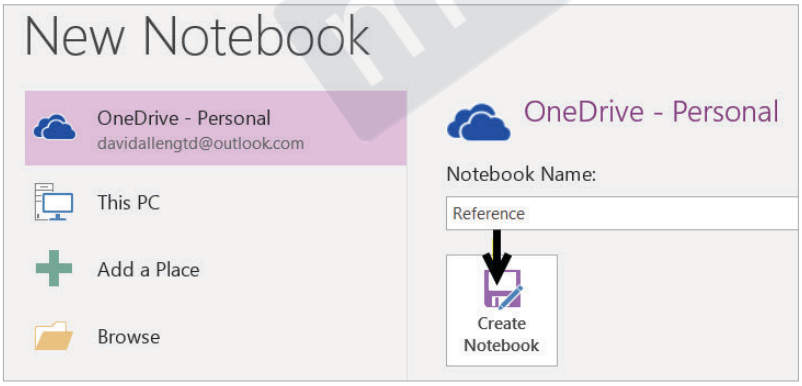
This functionality is so totally open-ended and in one sense, so simple, the possibilities are infinite.

Have you ever…

- had a wild idea you didn't know what to do with?
- wanted to remember the great restaurant you ate at in London?
- needed to remember all the things to check before you leave on a trip?
- read something inspirational you wanted to keep and re-read every once in a while?
- wondered where to put a suggestion about something to do the next time you visit a country?
- needed to remember everything you need to handle when you put on a special kind of event?
- wanted to keep track of all the articles, blog posts, or essays you might want to write?
- wanted to have a list of clients and prospects to review occasionally?
- wanted a place to keep track of the possible gifts to give special people in your life?
- needed a place to capture great team building and staff recognition ideas?
- needed a quick emergency contact list?

To get started, create a new Notebook called Reference. This will create nice, clean edges from your actionable information in your Projects & Actions Notebook.

To create a new Notebook, Click File > New.



Choose a location for your new Notebook, such as OneDrive, This /PC, or Add a Place. Assign the name "Projects & Actions" and click the Create Notebook button to save the new Notebook.

Your new Notebook should now be listed in the side panel.

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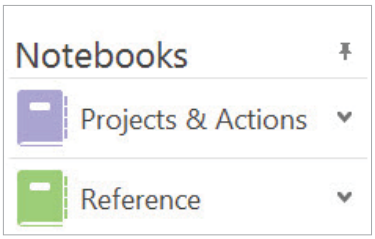
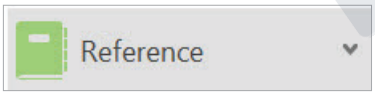


Here are some possible new lists within your Reference Notebooks to try:

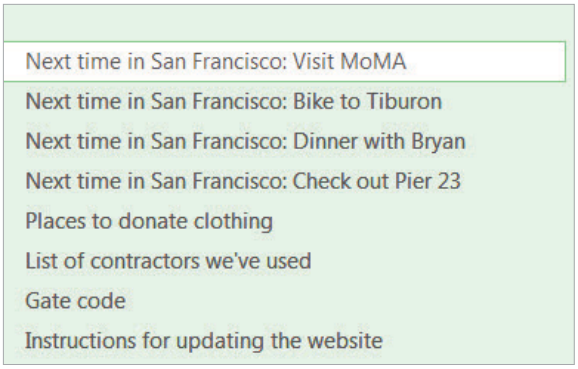
- Checklists
- Areas of focus
- Fun
- Ideas
- Inspirations and affirmations
- Great quotes
- Lists
- Might like to buy
- Might like to read
- Music to download
- Next time in…
- Travel
- Vacation ideas

You have a few options for how to set this up, depending on your preference. As we consistently suggest, be careful to not overcomplicate your system to the point where it becomes unwieldy to find or maintain the information. Read through the following options and be willing to experiment with the solution that will work best for you.

Example One Create reference lists and notes within one new Reference Notebook.



Creating individual notes:



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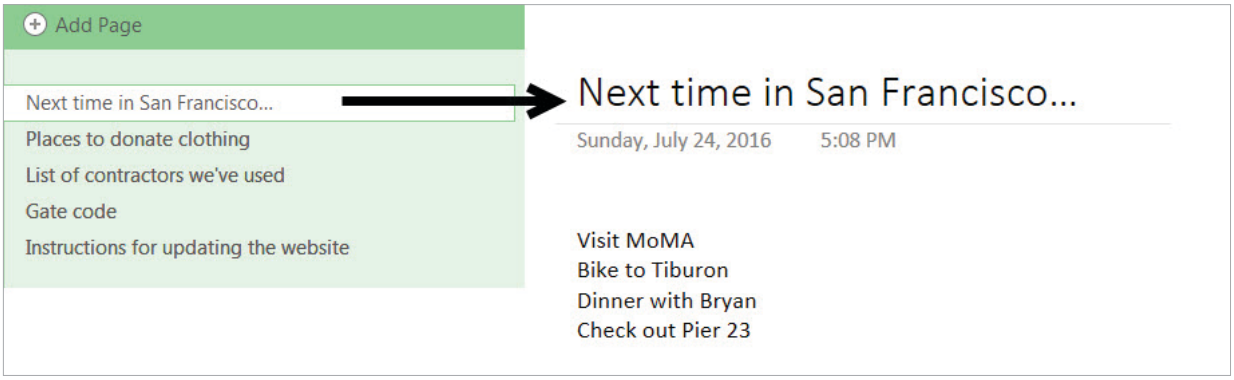
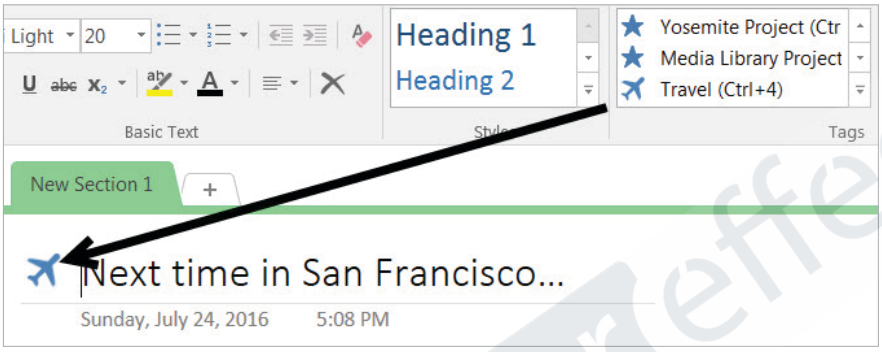
Creating lists of lists:

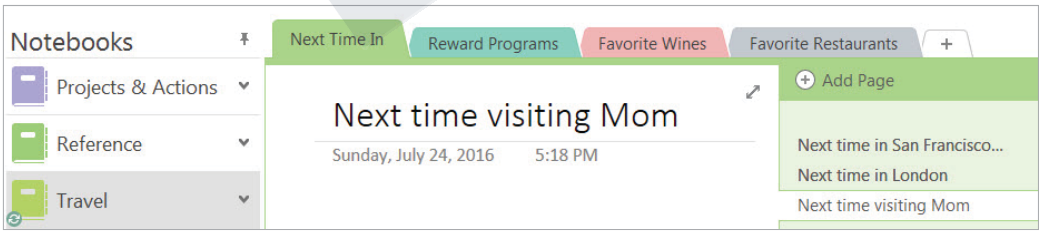


You may also find tags useful if you choose this option, especially as this Notebook grows in size, to help you further sort your information.



Example Two Create Reference Notebooks by Topic

If you expect to have quite a bit of Reference, you may want to consider creating separate Notebooks by topic. For example, if you have many travel-related reference items, you could create a Reference Notebook just to store travel notes:



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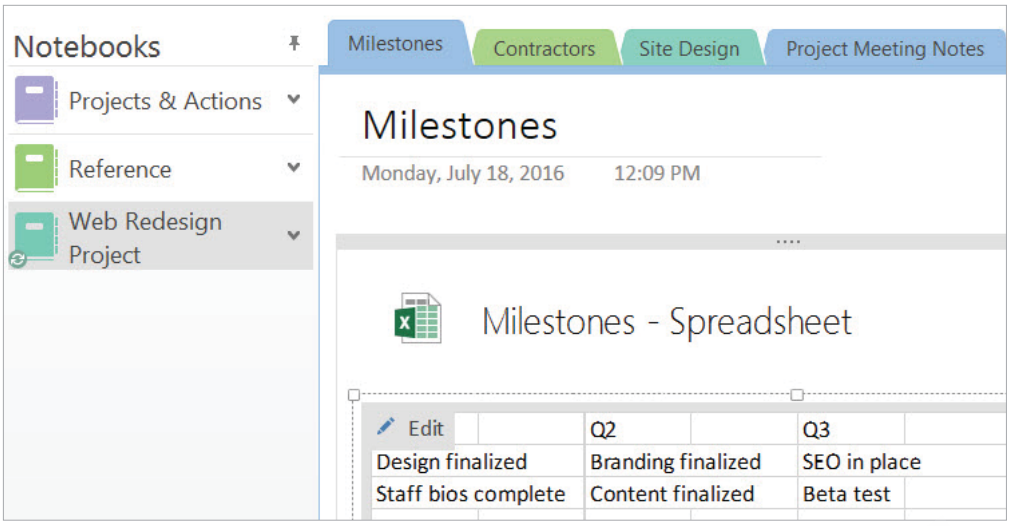
If you have a project with many project plans, notes, and reference information you will need to capture, that would be a great use of a Notebook:



The possibilities with capturing reference are endless. Just remember to keep it clean & current, and fast & fun.

SYNCING

SYNCING ONENOTE

Syncing your cloud-based data in OneNote between the web, your desktop, and mobile devices should be seamless. While the interface across the platforms will look slightly different, the basic user interface will be the same. If you create a new Notebook or Section on your mobile device, it should automatically sync to your desktop or web versions of OneNote.

There are far too many variables for us to cover syncing in this Guide, but there are lots of great resources about syncing OneNote on the Microsoft website.

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CONCLUSION

We hope this instruction guide has been useful. It is intended as an adjunct to our core education of workflow mastery developed over many years—not a substitute. The most successful implementation of this guide builds on the understanding of the GTD best practices presented in our many learning tools, including the *Getting Things Done* book, our public and on-site courses, individual coaching, and our online learning center GTD Connect®.

Please visit our website to take advantage of the many support tools and services available to assist you in getting your GTD system up and running.

FOR TECHNICAL SUPPORT WITH ONENOTE, PLEASE VISIT:

microsoft.com

FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

gettingthingsdone.com
gtdconnect.com

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